COVENANT TECHNOLOGY PARTNERS CASE STUDY

Revolutionizing SOP Access for Better Efficiency

Modern Work

BUSINESS PROBLEM

A prominent logistics company faced challenges in making their Standard Operating Procedures (SOPs) easily accessible to various user groups within the organization. They needed a solution that would allow users to find information through natural language questions, thereby enhancing the usability and accessibility of SOP documents.

They needed insights into:

- **Integration**: How to integrate the new SOP Chatbot with the existing FirstLogic user interface.
- **User Personas**: Defining and documenting user groups and their specific needs.
- **Data Management**: Establishing a lifecycle for creating, updating, and retiring SOPs.
- **User Training**: Training staff to use the new SOP Chatbot efficiently.
- **Post-Implementation Support**: Providing ongoing support to address any issues that arise after implementation.

OUR OBJECTIVE

The primary objectives were to design, develop, and implement a Standard Operating Procedure (SOP) Chatbot that could be accessed via a URL and integrated into the FirstLogic user interface. This involved defining user personas, documenting their needs and journeys, configuring the SharePoint site for SOPs, and providing comprehensive user training and post-implementation support.

OUR SOLUTION

The solutions involved conducting a design session to define and document user personas and their needs, establishing a lifecycle for SOPs, configuring the SharePoint site for SOPs, and overseeing the loading of live SOPs into the SharePoint site. Additionally, the project included configuring a SharePoint Agent within the live SOPs based on the design session outcomes, testing the Chatbot for each persona and journey, and providing detailed training sessions for users. The client was also provided with post-implementation support to ensure smooth operation.

THE RESULTS

The new SOP Chatbot enabled users to easily access SOP documents through natural language questions, significantly enhancing the usability and accessibility of SOPs. The project resulted in a well-defined data architecture and lifecycle for SOPs, formalized user personas and their needs, and a centralized SharePoint site for SOPs. The project was completed within the estimated timeline, and the client was provided with detailed training sessions and post-implementation support to ensure smooth operation. Improved accessibility allowed users to easily access SOP documents through natural language questions, reducing the time and effort required to find information. Enhanced usability made the Chatbot interface simple for users to interact with the system, leading to higher user satisfaction and productivity. Comprehensive data management ensured that the information remained current and relevant. Effective user training equipped users with the knowledge and skills needed to use the new system efficiently. Ongoing support provided by the project team ensured that any issues were promptly addressed, maintaining system reliability and performance. Successful integration of the SOP Chatbot into the FirstLogic user interface provided a seamless experience for users.

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