

Modernizing SharePoint: Redesign & Data Clean-up

Preparing SharePoint for modern tools and smarter workflows

Client Snapshot



Locust Walk is a global investment bank and strategic advisory firm exclusively focused on the life sciences industry. They partner with emerging and established biotech, medtech, and digital health companies to lead transformative transactions, including M&A, strategic licensing, and private/public financings. Known for their "science-first" approach, they bridge the gap between clinical innovation and financial success.

Testimonial

"The SharePoint redesign has had an extremely positive impact across our team's daily operations. By streamlining site structure and eliminating outdated or duplicate content, this project significantly improved productivity and made it much easier for users to find the information they need. The enhanced organization has also reduced confusion around file locations and improved consistency across departments. Additionally, the updated permissions model helped remove unnecessary access and strengthened overall governance, resulting in fewer access-related issues and a more secure, well-managed environment. A big thank you to the Velonex Technologies team for their support, planning, and execution on this project!"

-Chris Nyhan
Operations Supervisor

THE CHALLENGE: THE COST OF DATA COMPLEXITY

Client realized their legacy SharePoint environment was starting to slow teams down and limit efficiency. As the firm grew, so did the friction within their digital workspace:

- **The "Findability" Tax:** Content spread across multiple sites made it time-consuming for teams to quickly locate the right documents.
- **Security & Governance Gaps:** Legacy permission structures resulted in broader access than necessary and increased ticket requests related to file access.
- **The AI Readiness Gap:** To fully enable Microsoft 365 Copilot, data needed to be better organized and governed to ensure accurate and secure insights.
- **Communication Overload:** Limited centralized workspaces led to heavier reliance on internal email for document sharing and updates.

PROJECT GOALS

- ✓ Improve data organization and structure for easier access and management.
- ✓ Enhance security and compliance across all SharePoint content.
- ✓ Modernize SharePoint to support AI-driven tools like Microsoft 365 Copilot.
- ✓ Streamline collaboration by providing teams with consistent, ready-to-use workspaces.



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SOLUTIONS OVERVIEW



Velonex worked with the client to modernize their SharePoint environment and prepare it for advanced tools like Microsoft 365 Copilot.

The project included:

- **Planning & Analysis:** Gathered requirements, reviewed existing data and permissions, and designed a modern SharePoint structure aligned with Teams.
- **Site Design & Setup:** Created modern SharePoint sites, configured document libraries and metadata, and implemented secure, role-based permissions.
- **Data Migration & Cleanup:** Cleaned up existing content, migrated documents to the new environment, and verified data integrity and accessibility.
- **Training & Documentation:** Provided end-user training and documented the migration process to ensure smooth adoption and ongoing success.

KEY WORKFLOWS IMPLEMENTED



Document Organization



New files are stored in standardized libraries with consistent folder structures and metadata tagging.

Role-Based Access



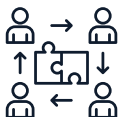
Permissions automatically enforce who can view, edit, or share content, improving security and compliance.

Content Lifecycle Management



Outdated or duplicate documents are identified and archived, keeping the environment clean.

Collaboration Across Teams



Teams can access, share, and update documents in real-time within the modern Teams-integrated SharePoint sites.

Results

80%

Productivity Improvement

75%

Fewer IT tickets related to file access and permissions

95%

Reduction in internal email communications

50%

Reduction in unnecessary user access and permissions