

Vertaview SharePoint Rebrand & Entity Rollout

Project Overview

The Vertaview SharePoint Rebrand & Entity Rollout is a structured transition from the legacy “Multi” SharePoint environment to a unified Vertaview SharePoint framework across the organisation.

This initiative aligns SharePoint with the current Vertaview group structure, strengthens usability for staff, and establishes a clear and sustainable governance model for long-term management.

The scope is limited to SharePoint structural alignment and platform naming consistency. It does not include functional redevelopment of HR, LMS or Rewards systems beyond approved branding and terminology updates.

Phases are deliberately sequenced to protect critical launch milestones while operating in parallel where appropriate to maintain delivery momentum.

This is not a redesign exercise. It is a controlled enterprise transition designed to remove legacy complexity, ensure structural consistency, and embed sustainable governance across all entity sites.

Project Objectives

- Transition SharePoint tenant from multicap.sharepoint.com to vertaview.sharepoint.com
- Remove legacy “Multi” branding across SharePoint
- Align platform naming (Vertaview Amplify, Vertaview Learn, Vertaview Work)
- Launch entity SharePoint sites under a consistent structure
- Prevent broken links and duplication
- Embed sustainable content governance across entities

Project Phases & Sequencing

Phase 0: SharePoint Tenant Stabilisation

17 February – 28 February

Transition from:

multicap.sharepoint.com → vertaview.sharepoint.com

This is a critical stabilisation milestone and must be completed before launching entity sites.

Key outcomes:

- Redirect validation
- Link integrity protection
- Stable build environment
- Prevention of post-launch rework

Phase 1: Vertaview Hub Structural Alignment

17 February – 31 March

The Vertaview Hub homepage is launched (18/02/26); however, structural alignment remains in progress.

Remaining activities:

- Navigation refinement
- SharePoint link validation
- Asset audit
- Legacy page clean-up
- Governance documentation

The Hub must be structurally stable before scaling entity sites.

Phase 2: Platform Alignment Within SharePoint

These platforms are referenced within SharePoint and require naming and link alignment.

Vertaview Amplify

Rebrand page live.

Alignment Completion Target: 15 March

Remaining activities:

- SharePoint asset audit
- Cross-site validation
- Removal of legacy references

Vertaview Learn

Brand launch: **23 February**

SharePoint alignment completion target: **15 April**

Remaining activities:

- Implement approved branding
- Update SharePoint references
- Conduct asset audit
- Remove legacy MultiLearn references

Vertaview Work

Brand launch: **2 March**

SharePoint alignment completion target: **30 April**

Scope includes:

- Confirm final naming
- Update SharePoint references
- Conduct asset audit
- Remove legacy MultiWork references

Vertaview Work represents the largest remaining transition effort within this phase.

Phase 3: Entity Rollout & Governance Embedding

1 March – 29 June

This phase represents the structured rollout of all entity SharePoint sites under the Vertaview tenant, alongside final platform alignment and governance embedding.

Entity Launch Schedule

All About Living – 30 March

Arbourwell – 20 April

Allinto – 18 May

Open Minds (Homepage Refresh) – 8 June

Multicap (Homepage Refresh) – 29 June

Each entity build includes:

- Site Champion nomination
- Content structuring
- SharePoint link and asset audit
- Platform validation
- Testing and controlled launch

All sites will operate under vertaview.sharepoint.com.

Governance & Site Champion Model

Governance is embedded during rollout.

Each entity will nominate a SharePoint Champion responsible for:

- Publishing entity-specific news
- Managing Document Hubs
- Maintaining local site content

Corporate news will be managed centrally by Marketing & Communications and distributed across all sites.

Entity-specific news will be managed locally by trained Champions, ensuring sustainability and reducing reliance on Group Services.

Site Champion Training

Training includes:

Operational:

- Creating, editing and deleting news posts
- Uploading and maintaining documents
- Managing Document Hubs (branding assets, templates, minutes, presentations)

Governance:

- Confidentiality requirements
- Appropriate content standards
- Privacy considerations
- Escalation pathways

Ongoing: SharePoint Asset & Link Audit

17 February – 30 June

A structured audit runs across all phases to identify and update:

- Navigation links
- Embedded hyperlinks
- Document library references
- Cross-site links
- Legacy “Multi” terminology

This protects operational integrity and reduces compliance risk.

Key Milestones

Milestone	Date
Vertaview Hub Homepage Launch	18 February
SharePoint Tenant Stabilised (vertaview.sharepoint.com live)	28 February
Vertaview Amplify SharePoint Alignment Complete	15 March
Vertaview Learn Brand Launch	23 February
Vertaview Learn SharePoint Alignment Complete	15 April
Vertaview Work Brand Launch	2 March
Vertaview Work SharePoint Alignment Complete	30 April
All About Living SharePoint Launch	30 March
Arbourwell SharePoint Launch	20 April
Allinto SharePoint Launch	18 May
Open Minds Refresh	8 June
Multicap Refresh	29 June

Key Risks

- Broken links following tenant transition
- Incomplete asset audit leading to legacy references
- Brand inconsistency across platforms
- Change fatigue across entities
- Delays in Vertaview Work alignment

These risks are mitigated through sequencing, redirect validation, structured audits and staged rollout.

Success Measures

The project will be considered successful when:

- 100% of SharePoint sites operate under vertaview.sharepoint.com
- No active legacy “Multi” references remain in SharePoint navigation or system links
- All entities have trained and active Site Champions
- Platform naming is consistent across SharePoint
- No critical broken links are identified post-launch
- Governance processes are embedded and operating

Strategic Outcome

This project delivers:

- A unified SharePoint environment aligned to Vertaview
- Clear separation between group-wide and entity information
- Improved staff navigation and system clarity
- Reduced duplication and confusion
- A sustainable, scalable governance model

It ensures SharePoint reflects the organisation's current structure and supports future growth in a controlled and maintainable way.

Project Timeline Overview

Phase	Workstream	Key Activities	Start	Finish	Dependency	Status
Phase 0	SharePoint Tenant Stabilisation	Tenant rename to vertaview.sharepoint.com Redirect validation Teams / OneDrive testing Link integrity checks	17 Feb	28 Feb	None	Priority
Phase 1	Vertaview Hub Structural Alignment	Navigation refinement Internal link validation Asset audit Legacy page clean-up Governance documentation	17 Feb	31 Mar	Tenant Stabilisation	In Progress
Phase 2.1	Vertaview Amplify SharePoint Alignment	Asset audit Cross-site validation Removal of legacy references	18 Feb	15 Mar	Tenant Stabilisation	Partially Complete
Phase 2.2	Vertaview Learn Brand Launch	Brand implementation within LMS	23 Feb	23 Feb	None	Complete
Phase 2.2	Vertaview Learn SharePoint Alignment	Update SharePoint references Asset audit Remove legacy MultiLearn references	23 Feb	15 Apr	Brand Launch	In Progress
Phase 2.3	Vertaview Work Brand Launch	Brand naming confirmed and implemented	2 Mar	2 Mar	None	Complete
Phase 2.3	Vertaview Work SharePoint Alignment	Update SharePoint references Asset audit Remove legacy MultiWork references	2 Mar	30 Apr	Tenant Stabilisation	Not Commenced
Phase 3.1	All About Living Site Build & Launch	Build under new tenant Link & asset audit Testing & launch	1 Mar	30 Mar	Tenant Stabilisation	First Entity
Phase 3.2	Arbourwell Site Build & Launch	Content build Link audit Testing & launch	31 Mar	20 Apr	AAL Launch	Scheduled
Phase 3.3	Allinto Site Build & Launch	Content build Link audit Testing & launch	21 Apr	18 May	Arbourwell	Scheduled
Phase 3.4	Open Minds Site Refresh	Structural refresh Navigation alignment Link audit Launch	19 May	8 Jun	Allinto	Scheduled
Phase 3.5	Multicap Site Refresh	Structural refresh Removal of legacy references Navigation alignment Launch	9 Jun	29 Jun	Open Minds	Scheduled

Project Phases Scoping Document

Phase 0 – SharePoint Tenant Stabilisation

Independent IT Workstream within the Vertaview SharePoint Alignment Project

Overview

Phase 0 – SharePoint Tenant Stabilisation will be delivered as an independently managed technical workstream led by the IT Lead.

This phase involves the transition of the SharePoint tenant from:

multicap.sharepoint.com → vertaview.sharepoint.com

Due to the enterprise-wide technical impact of a Microsoft tenant rename, this activity will be managed within IT's operational governance, change control and delivery framework.

While Phase 0 forms part of the broader Vertaview SharePoint Alignment & Entity Rollout project, its execution will occur independently of Phases 1–3. Planning and preparatory activities for subsequent phases may continue in parallel; however, no entity site launch will proceed until tenant stabilisation is formally confirmed complete and control transitions back to the main project.

This structure ensures technical control while maintaining overall program momentum.

1. Purpose

Phase 0 ensures the SharePoint environment is technically stabilised prior to:

- Entity site launches
- Final platform link validation
- Full alignment of SharePoint navigation structures

It establishes a secure and operationally stable foundation upon which the remaining project phases depend.

2. Strategic Objective

To complete a controlled tenant transition that:

- Preserves link integrity
- Prevents broken navigation
- Protects Microsoft Teams and OneDrive integrations
- Maintains external sharing functionality
- Minimises user disruption
- Ensures enterprise system stability
- Reduces downstream rework risk

3. Scope of Phase 0

In Scope

- Tenant rename to vertaview.sharepoint.com
- Redirect configuration and validation
- DNS and system propagation confirmation
- Microsoft Teams tab validation
- OneDrive link validation
- SharePoint application validation
- External sharing confirmation
- Identification of third-party or enterprise systems referencing SharePoint URLs
- Controlled user communication
- Post-migration stabilisation monitoring

Out of Scope

- Entity site builds
- Platform naming updates
- Governance training
- Content clean-up
- Structural redesign
- Non-SharePoint systems

4. Delivery & Execution Approach

Phase 0 will be delivered under IT's formal change management framework.

Stage 1 – Pre-Transition Assessment

Objective: Identify technical risks and dependencies.

Activities:

- Confirm Microsoft tenant rename process and prerequisites
- Confirm redirect behaviour
- Identify external integrations and system dependencies
- Assess embedded SharePoint references within Teams
- Assess risk related to bookmarked URLs
- Confirm change window and rollback capability

Deliverable:

Pre-Transition Risk Assessment

Stage 2 – Stakeholder Alignment

Objective: Confirm enterprise readiness for transition.

Stakeholders:

- IT Lead
- Project Sponsor
- Project Lead
- Communications Lead
- Relevant Platform Owners

Confirm:

- Approved change date
- Downtime window (if applicable)
- Communication timing
- Escalation contacts
- Incident response pathway

Deliverable:

Approved Transition Plan

Stage 3 – Tenant Rename Execution

Objective: Complete tenant rename within agreed window.

Activities:

- Execute Microsoft tenant rename
- Validate DNS propagation
- Confirm new URL accessibility
- Confirm legacy URL redirect behaviour
- Capture error logs and system alerts
- Monitor system stability during transition window

Deliverable:

Rename Confirmation Record

Stage 4 – Validation & Testing

Objective: Confirm operational stability.

Validation Checklist:

- SharePoint Hub accessible
- Existing entity sites accessible
- Teams tabs functioning correctly
- OneDrive links operating normally
- Quick links functioning
- Embedded hyperlinks operational
- External guest access validated
- Document libraries accessible
- Integration references functioning

Testing Responsibility:

- IT validation
- Project Lead validation
- Selected user test group

Deliverable:

Validation Sign-Off

Objective: Manage awareness and confirm stability.

Communication Includes:

- Notification of URL update
- Guidance regarding bookmarks
- Confirmation of redirect functionality
- Clear contact pathway for issues

Monitoring Period:

- 5–10 business days post-migration
- Log and resolve issues
- Monitor incident reports
- Confirm system stability

Deliverable:

Stabilisation Confirmation

5. Risks & Mitigation

Risk	Impact	Mitigation
Broken internal links	High	Structured validation checklist
Teams integration failure	High	Pre-testing and IT validation
User confusion	Medium	Clear communication
External sharing disruption	Medium	Guest access testing
Third-party integration impact	Medium	Pre-transition integration review
Missed embedded links	Medium	Cross-check during Phase 2 audit

6. Change Control & Contingency

The tenant migration will be executed in accordance with IT's formal enterprise change management procedures.

Rollback and contingency procedures will be maintained by IT.

If significant disruption occurs:

- Incident response protocols will be activated
- Escalation will follow IT governance pathways
- Project Sponsor will be notified
- Stabilisation confirmation will not be issued until resolved

7. Success Criteria

Phase 0 will be considered complete when:

- vertaview.sharepoint.com is fully operational
- multicap.sharepoint.com redirects successfully
- Microsoft Teams and OneDrive function normally
- Integration points operate as expected
- No critical unresolved incidents remain after monitoring
- Formal written confirmation is provided by the IT Lead

8. Transition & Handover to Main Project

Upon completion of migration and stabilisation monitoring, the IT Lead will provide formal written confirmation that:

- Tenant rename is complete
- Redirect behaviour confirmed
- System validation complete
- No critical incidents remain open

Following this confirmation:

- Control transitions back to the Vertaview SharePoint Alignment Project
- Final platform validation (Phase 2) may proceed
- Entity site launch approvals (Phase 3) may be granted

No entity site will launch without formal Phase 0 completion confirmation.

9. Governance & Accountability

Technical Delivery:

IT Lead

Program Oversight:

Project Sponsor

Integration with Broader Project:

Project Lead

Formal completion requires sign-off from:

- IT Lead
- Project Lead

10. Strategic Importance to the SharePoint Alignment Project

Although delivered independently by IT, Phase 0 is a critical dependency for the broader Vertaview SharePoint Alignment & Entity Rollout project.

Tenant stabilisation underpins:

- Platform alignment integrity
- Entity site launch readiness
- Link validation accuracy
- Governance consistency
- Enterprise system stability

Formal stabilisation confirmation ensures that subsequent phases proceed within a secure and controlled technical environment.

Without successful completion of Phase 0, downstream phases risk rework, link failures and operational disruption.

Phase 1 – Vertaview Hub Structural Alignment

1. Purpose

Phase 1 ensures the Vertaview Hub is structurally sound, navigationally clear and governance-ready before expanding into entity rollout (Phase 3).

While the Vertaview Hub homepage has launched, the underlying structure, navigation and link integrity require refinement and validation to support long-term scalability.

This phase strengthens the parent SharePoint site before scaling across all entities.

2. Strategic Objective

To finalise and validate the Vertaview Hub structure so that it:

- Provides a clear parent-level navigation framework
- Correctly links to Amplify, Learn and Work
- Eliminates legacy references
- Supports entity site integration
- Is scalable for future growth
- Has embedded governance controls

3. Scope of Phase 1

In Scope

- Hub navigation refinement
- Quick link validation
- Cross-site linking structure
- Removal of legacy “Multi” references within Hub
- Document Hub structure review
- Asset clean-up
- Governance documentation
- Homepage behaviour confirmation
- Accessibility and usability review

Out of Scope

- Entity site builds
- Platform renaming implementation
- Functional system changes

4. Execution Strategy

Phase 1 will follow a structured six-stage approach.

Stage 1 – Structural Review & Mapping

Objective: Assess the current Hub architecture.

Activities:

- Map current navigation hierarchy
- Identify duplicate links
- Identify legacy references
- Confirm logical grouping of content
- Review button / tile placement
- Review alignment with Executive-approved structure

Deliverable:

- Hub Structure Review Report

Stage 2 – Navigation Rationalisation

Objective: Ensure clear, scalable navigation.

Activities:

- Confirm top-level menu structure
- Confirm dropdown hierarchy
- Remove redundant links
- Standardise naming conventions
- Align labels with platform naming (Amplify, Learn, Work)
- Confirm entity linking logic

Decision Required:

- Default home page behaviour (Hub vs entity landing)

Deliverable:

- Approved Navigation Structure

Stage 3 – Link & Asset Audit (Hub-Specific)

Objective: Validate all Hub links prior to entity replication.

Audit includes:

- Navigation links
- Quick links
- Embedded hyperlinks
- Platform buttons
- Policy links
- External system links
- Document libraries

Deliverable:

- Hub Audit Register

Stage 4 – Document Hub & Asset Clean-Up

Objective: Ensure core documents are current and governed.

Activities:

- Review branding asset libraries
- Remove outdated files
- Confirm version control
- Confirm document ownership
- Confirm update authority

Deliverable:

- Cleaned & structured Document Hub

Stage 5 – Governance Framework Embedding

Objective: Establish control model before scaling.

Activities:

- Confirm who owns Hub updates
- Confirm corporate news workflow
- Confirm approval pathway
- Confirm escalation process
- Document governance structure

Deliverable:

- Hub Governance Framework

Stage 6 – Validation & Usability Testing

Objective: Confirm Hub is stable and intuitive.

Testing includes:

- Desktop view validation
- Mobile view validation
- Cross-browser testing
- Teams integration testing
- Navigation stress testing
- Quick link validation

Test Group:

- Marcomms
- IT
- Selected operational staff

Deliverable:

- Hub Alignment Sign-Off

5. Risks & Mitigation

Risk	Impact	Mitigation
Navigation confusion	Medium	Structured mapping & approval
Broken links	High	Formal audit register
Duplicate governance controls	Medium	Centralised ownership confirmation
Poor scalability	High	Confirm structure before entity rollout

6. Dependencies

- Phase 0 Tenant Stabilisation complete
- Platform naming confirmed (Phase 2 inputs)
- Homepage behaviour decision

7. Success Criteria

Phase 1 will be considered complete when:

- Hub navigation is approved and stable
- No legacy “Multi” references remain within Hub
- All links validated and functional
- Document Hub structured and governed
- Corporate news workflow confirmed
- Governance framework documented
- Sign-off obtained from Project Sponsor

8. Timeline

Phase 1: 17 February – 31 March

Must reach structural stability before All About Living launch on 30 March.

9. Strategic Importance

Phase 1 ensures:

- The Hub is not just visually live but structurally sound
- Platform alignment has a stable anchor point
- Entity sites replicate a clean model
- Governance is embedded early
- Future growth does not create structural fragmentation

Without Phase 1 discipline, Phase 3 risks inheriting structural weaknesses.

Phase 2 – Platform Alignment Within SharePoint

Vertaview Amplify | Vertaview Learn | Vertaview Work

1. Purpose

This document defines the scope, process and governance approach for **Phase 2 – Platform Alignment Within SharePoint**, as outlined in the approved Executive Summary.

Phase 2 ensures that Vertaview Amplify, Vertaview Learn and Vertaview Work are consistently branded, correctly referenced and fully aligned within the SharePoint environment.

While each platform differs in status, ownership and asset footprint, the project management methodology applied to all three will remain consistent.

2. Objective

To ensure that all SharePoint-facing references to:

- Vertaview Amplify
- Vertaview Learn
- Vertaview Work

are:

- Correctly branded
- Free of legacy “Multi” terminology
- Link validated
- Governed by clear ownership
- Consistent across all entity sites

3. Scope of Phase 2

In Scope

- Platform naming confirmation
- SharePoint navigation updates
- Quick link updates
- Embedded hyperlink validation
- Document Hub reference updates
- Removal of legacy Multi* terminology within SharePoint
- Cross-entity link validation
- Stakeholder confirmation
- Governance ownership documentation

Out of Scope

- Functional changes to platform systems
- Rebuild of LMS or HR systems
- Non-SharePoint repositories
- External website changes

4. Standardised Project Management Methodology

The following structured process will apply to all three platforms.

Stage 1 – Naming & Brand Confirmation

Objective: Confirm final approved naming and visual identity before alignment.

Activities:

- Confirm final platform name
- Confirm approved logo and brand assets
- Confirm SharePoint tile label
- Confirm navigation wording
- Confirm button description text

Deliverable:

- Naming & Brand Confirmation Record

Stage 2 – Stakeholder & Ownership Identification

Objective: Establish clear responsibility for each platform.

Each platform will confirm:

- Platform Owner
- SharePoint Site Champion
- Subject Matter Expert
- Technical Contact (if required)

Deliverable:

- Platform Stakeholder Register

Stage 3 – SharePoint Asset & Link Audit

Objective: Identify every SharePoint reference requiring update.

Audit includes:

- Hub navigation
- Entity site navigation
- Quick links
- Onboarding pages within SharePoint
- Document Hubs
- Embedded hyperlinks
- Cross-platform references
- Legacy terminology
- Completed Phase 2 Audit Register

Stage 4 – Implementation & Alignment

Objective: Update and align SharePoint references.

Activities:

- Update navigation labels
- Replace legacy references
- Update logos and visual assets
- Validate redirects
- Confirm consistency across entity sites

Deliverable:

- Updated SharePoint structure

Stage 5 – Validation & Testing

Objective: Ensure all updates function correctly prior to sign-off.

Testing includes:

- Link testing across all entity sites
- Hub-to-entity validation
- Mobile validation
- Teams tab validation (if applicable)
- Stakeholder confirmation

Deliverable:

- Platform Alignment Sign-Off

Stage 6 – Governance Confirmation

Objective: Embed long-term accountability.

Activities:

- Confirm ongoing content owner
- Confirm update authority
- Confirm escalation pathway
- Update governance register

Deliverable:

- Governance Register Update

5. Platform-Specific Application

Although the process remains consistent, the scope and risk level vary.

Vertaview Amplify

Status: Brand implemented and page live.

Primary Focus:

- SharePoint audit
- Removal of legacy references
- Cross-entity validation

Risk Level: Low

Vertaview Learn

Status: Branding under review.

Primary Focus:

- Post-approval brand implementation
- SharePoint reference updates
- Onboarding reference validation

Risk Level: Medium

Dependency: Final brand approval

Vertaview Work

Status: Transition not commenced.

Primary Focus:

- Naming confirmation
- Full SharePoint reference update
- Asset audit
- Removal of legacy MultiWork references

Risk Level: High

Dependency: Naming confirmation

6. Timeline Alignment

Platform	Brand Launch	SharePoint Alignment Complete
Vertaview Amplify	Complete	15 March
Vertaview Learn	23 February	15 April
Vertaview Work	2 March	30 April

All alignment must be completed prior to final entity rollout stabilisation in Phase 3.

7. Dependencies

- Completion of Phase 0 – Tenant Stabilisation
- Brand approval
- Naming confirmation
- Stakeholder availability
- Completion of asset audit

8. Risks & Mitigation

Risk	Mitigation
Broken links	Structured audit and testing
Inconsistent branding	Centralised audit register
Delayed approvals	Early escalation
Governance gaps	Mandatory ownership confirmation

9. Success Criteria

Phase 2 will be considered complete when:

- No legacy “Multi” references remain within SharePoint
- All links are validated across entity sites
- Navigation labels are consistent
- Stakeholder sign-off obtained
- Governance ownership documented

10. Deliverables

For each platform:

- Naming Confirmation Record
- Stakeholder Register
- Asset & Link Audit Register
- Updated SharePoint References
- Validation & Sign-Off Record
- Governance Confirmation

Excellent — Phase 3 is the operational rollout phase.

Phase 0 stabilised the tenant.

Phase 1 strengthened the Hub.

Phase 2 aligned the platforms.

Phase 3 scales the model across entities and embeds governance permanently.

Below is the formal, structured **Phase 3 – Entity Rollout & Governance Embedding Plan**, written to sit under your Project Charter.

Phase 3 – Entity Rollout & Governance Embedding

1. Purpose

Phase 3 delivers the structured rollout of entity SharePoint sites under the Vertaview tenant and embeds the governance model required for long-term sustainability.

This phase ensures that each entity:

- Operates within the Vertaview SharePoint framework
- Has consistent navigation and platform integration
- Is free of legacy “Multi” references
- Has trained Site Champions
- Can manage local content sustainably

Phase 3 transforms the project from structural alignment to operational adoption.

2. Strategic Objective

To deploy entity SharePoint sites in a controlled, sequenced manner while embedding governance and reducing reliance on Group Services for ongoing maintenance.

3. Scope of Phase 3

In Scope

- Entity SharePoint site builds and refreshes
- Migration or restructure of entity content
- Entity-level link and asset audit
- Platform validation (Amplify, Learn, Work links)
- Navigation alignment
- Site Champion nomination and onboarding
- Governance training
- Controlled launch and post-launch monitoring

Out of Scope

- Functional system redevelopment
- External website changes
- HR or LMS system changes

4. Entity Rollout Schedule

Entity	Launch Date
All About Living	30 March
Arbourwell	20 April
Allinto	18 May
Open Minds (Homepage Refresh)	8 June
Multicap (Homepage Refresh)	29 June

Rollout follows a sequenced model to allow learning and refinement between launches.

5. Standardised Rollout Methodology

Each entity will follow the same six-stage process.

Stage 1 – Kick-Off & Scope Confirmation

Objective: Align stakeholders before build begins.

Activities:

- Confirm Site Champion
- Confirm entity-specific requirements
- Confirm key content categories
- Confirm platform link needs
- Confirm any legacy content requiring removal

Deliverable:

- Entity Scope Confirmation

Stage 2 – Content Mapping & Structure Design

Objective: Create a scalable entity structure.

Activities:

- Map current content
- Remove redundant or outdated material
- Align structure to Hub framework
- Confirm navigation labels
- Confirm quick link priorities

Deliverable:

- Approved Entity Site Structure

Stage 3 – Entity Asset & Link Audit

Objective: Remove legacy references and protect integrity.

Audit includes:

- Legacy “Multi” terminology
- Outdated documents
- Broken hyperlinks
- Platform references
- Quick links
- Cross-entity links

Deliverable:

- Entity Audit Register

Stage 4 – Build & Configuration

Objective: Construct entity site within the new framework.

Activities:

- Create site under vertaview.sharepoint.com

- Apply consistent branding
- Configure navigation
- Upload approved documents
- Implement validated links
- Embed platform tiles

Deliverable:

- Built Entity Site

Stage 5 – Validation & Testing

Objective: Ensure stability before launch.

Testing includes:

- Link validation
- Platform access validation
- Document access validation
- Mobile responsiveness
- Teams tab validation (if applicable)
- Site Champion walkthrough

Deliverable:

- Pre-Launch Validation Sign-Off

Stage 6 – Launch & Post-Launch Monitoring

Objective: Ensure smooth transition.

Activities:

- Launch communication
- Monitor user feedback
- Track broken link reports
- Address early-stage issues
- Confirm Champion readiness

Monitoring Period:

- 2 weeks post-launch

Deliverable:

- Launch Confirmation

6. Governance Embedding

Governance is embedded progressively during Phase 3.

Site Champion Model

Each entity must nominate a Site Champion responsible for:

- Publishing entity-specific news
- Managing Document Hubs
- Maintaining content integrity
- Escalating issues

Corporate news remains centrally managed by Marketing & Communications.

Site Champion Training

Training includes:

Operational:

- News publishing
- Editing and deleting content
- Document uploads
- Managing Document Hubs

Governance:

- Confidentiality requirements
- Appropriate publication standards
- Brand compliance
- Escalation pathways

Training is delivered prior to or immediately following launch.

7. Dependencies

- Phase 0 Tenant Stabilisation complete
- Phase 1 Hub alignment complete
- Phase 2 platform alignment stable
- Site Champion nomination confirmed
- Governance model documented

8. Risks & Mitigation

Risk	Impact
Inconsistent structures across entities	Medium
Legacy references reintroduced	High
Governance not adopted	Medium
Over-reliance on Group Services	Medium
Launch fatigue	Medium

9. Success Criteria

Phase 3 will be considered complete when:

- All entity sites operate under vertaview.sharepoint.com
- No legacy “Multi” references remain within entity SharePoint sites
- All platform links validated across entities
- Site Champions trained and active
- Governance processes embedded
- No critical broken links remain after monitoring

10. Strategic Importance

Phase 3 is the adoption phase.

It:

- Demonstrates visible transformation
- Improves user clarity
- Reduces brand fragmentation
- Embeds accountability
- Creates a scalable SharePoint ecosystem

Without disciplined Phase 3 execution, earlier phases lose impact.

All About Living SharePoint Site

Scoping Document | Phase 3 – Entity Rollout and Governance Embedding

1. Context and Change Considerations

All About Living does not currently operate a dedicated SharePoint site. The introduction of this site represents a new entity level platform for AAL staff.

This initiative does not introduce new systems or new processes. Existing platforms such as AlayaCare, Vertaview Work, Vertaview Learn, policies, forms and templates will remain unchanged. The purpose of this site is to consolidate access into one central location.

AAL has experienced ongoing operational and process change. Change fatigue is therefore a recognised consideration. The design and communication approach must position this site as a simplification initiative and a single source of truth where staff can easily locate the links and resources they already use.

The site must prioritise clarity, ease of access and minimal disruption. It should reduce the need to search through emails, shared drives or multiple systems, and support future organisational updates by providing one consistent place to access information.

2. Purpose

The All About Living SharePoint site will operate as the entity specific landing page within the Vertaview SharePoint framework.

The site will:

- Mirror the Vertaview Hub structure for consistency
- Provide quick access to corporate platforms
- Provide entity specific operational tools
- Centralise communication
- Improve frontline usability
- Embed a sustainable governance model

This site will serve as the template model for future entity builds.

3. Scope

In Scope

- Creation of a dedicated AAL SharePoint site
- Integration within Vertaview Hub navigation
- Corporate quick access tile mirroring
- Entity specific quick links
- Unified news functionality with shared publishing permissions
- Document hub structure
- Governance model implementation
- Site Champion nomination and training
- Asset and link audit prior to launch

Out of Scope

- HRIS redevelopment
- LMS redevelopment
- Payroll system changes
- Website redesign
- Policy rewriting
- Client file storage
- Confidential HR document storage

4. Stakeholders

Primary stakeholder groups include:

- Executive Team
- Senior Leadership Team
- Scheduling
- Care Management Team
- Office Staff
- Team Leaders
- Field Staff
- Quality Team (GSS)
- HR (GSS)
- Communications (GSS)
- Accounts (GSS)

Each stakeholder group must be able to access their key tools within one to two clicks.

5. Design Principles

The AAL site must:

- Mirror Vertaview Hub structure
- Maintain consistent navigation hierarchy
- Prioritise frontline accessibility
- Avoid clutter
- Provide large clear quick access tiles
- Maintain version control in document libraries
- Prevent duplication of documents
- Support mobile view

High priority links must be visible without excessive scrolling.

6. Homepage Structure

A. Hero Section

- All About Living branding
- Rotating banner capability
- Executive message capability
- Important update alert banner functionality

B. Quick Access Tiles – Mirrored Corporate Links

The following links must mirror Vertaview Hub naming:

- Vertaview Work
- Vertaview Learn
- Vertaview Rewards
- Policies and Procedures
- RiskMan
- Service Desk or Jira
- Brand Hub
- Fleet if applicable

C. AAL Core Systems and Operational Links

Entity specific additions must include:

- AlayaCare
- AAL Policies and Procedures
- Forms and Templates
- Working Collateral such as handbooks and brochures
- Contact Numbers and Phone Directory
- Scheduling Resources
- Care Management Resources
- Quality and Compliance Resources
- Feedback and Complaints link
- Website link
- Social Media links
- Meeting Room bookings
- EAP
- NSP salary sacrifice provider
- Aged Care Act reference
- Aged Care Quality Standards

D. News and Communications

The site will contain a single unified news feed.

This feed will:

- Display corporate announcements
- Display AAL specific updates
- Be accessible for publishing by Corporate Communications and the AAL Site Champion

Governance controls will define publishing permissions to ensure content quality and appropriateness.

This unified approach ensures:

- Consistency of communication
- Clear visibility of corporate updates
- Reduced duplication
- Simpler content management

7. Document Hub Structure

Structured libraries must include:

- Policies
- Procedures
- Forms
- Templates including letterhead and meeting shells
- Brochures
- Handbooks
- Non confidential meeting minutes
- Governance documents

The following must not be stored:

- Client records
- Payroll documents
- Confidential HR files

Document ownership must be assigned and version control enabled.

8. Governance Model

All About Living must nominate:

- Primary Site Champion
- Secondary Site Champion

Responsibilities include:

- Publishing entity specific news
- Maintaining document currency
- Monthly link validation
- Removing outdated materials
- Escalating structural issues

Corporate Communications retains authority over corporate announcements and governance standards.

9. Content Audit Requirements

Prior to launch:

- Remove all legacy Multi references
- Validate all quick links
- Confirm policy currency
- Remove duplicate files
- Confirm ownership of documents
- Validate integration with Work, Learn and Rewards

An Audit Register must be completed and signed off before launch.

10. Communication and Training Requirements

Because this is a new site for AAL, a structured introduction is required.

This will include:

- Leadership endorsement
- Clear positioning as consolidation not change
- Simple walkthrough sessions
- One page quick reference guide
- Inclusion in induction materials
- Reinforcement in team meetings

The communication focus must be on ease of access and simplification.

11. Risks and Mitigation

Risk	Mitigation
Change fatigue	Position as consolidation and simplification
Homepage clutter	Structured layout and prioritisation
Duplicate documents	Pre launch audit
Governance drift	Site Champion model
Low adoption	Team leader walkthroughs
Broken links	Validation checklist

12. Success Criteria

The AAL SharePoint site will be considered successful when:

- Staff can access core systems in one to two clicks
- No legacy naming remains
- Corporate and AAL updates are visible in a single unified feed
- Document libraries are structured and governed
- Site Champions are active
- Reduction in internal queries regarding location of forms and policies

13. Strategic Importance

All About Living is the first fully built entity site within the Vertaview framework.

It establishes:

- The structural template
- The governance model
- The usability standard
- The communication approach

Successful delivery will provide a replicable model for Allinto, Arbourwell, Multicap and Open Minds.

14. Build Checklist

1. Pre-Build Readiness

Governance & Approval

- ☐ Scope document approved
- ☐ Executive endorsement confirmed
- ☐ Launch date agreed
- ☐ Phase 0 tenant stabilisation confirmed by IT
- ☐ Site Champions nominated (Primary and Secondary)
- ☐ Site Champion briefing completed

Content Preparation

- ☐ Document audit completed
- ☐ Duplicate documents removed
- ☐ Document owners confirmed
- ☐ Policies confirmed current
- ☐ Forms confirmed current
- ☐ Templates confirmed current
- ☐ Working collateral approved for upload
- ☐ Quick links list finalised
- ☐ Contact numbers confirmed accurate

Communications

- ☐ Launch messaging drafted
- ☐ CEO endorsement drafted
- ☐ Training approach agreed
- ☐ Quick reference guide planned
- ☐ Team Leader briefing schedule

2. Structural Build – SharePoint Setup

Site Creation

- ☐ AAL site created under Vertaview Hub
- ☐ Correct site permissions configured
- ☐ Site Champions given edit access
- ☐ Corporate publishing access confirmed

Navigation Structure

- ☐ Top navigation mirrors Vertaview Hub
- ☐ Entity specific navigation added
- ☐ Quick access tiles ordered and approved
- ☐ All tile naming consistent with corporate naming
- ☐ No legacy “Multi” naming remains

3. Homepage Build

Hero Section

- ☐ AAL branding applied
- ☐ Banner area configured
- ☐ Important alert section enabled
- ☐ Placeholder executive message loaded

Quick Access Tiles

- ☐ Vertaview Work
- ☐ Vertaview Learn
- ☐ Vertaview Rewards
- ☐ Policies and Procedures
- ☐ RiskMan
- ☐ Jira / Service Desk
- ☐ Brand Hub
- ☐ Fleet if required
- ☐ AlayaCare
- ☐ AAL forms and templates
- ☐ Contact numbers
- ☐ Feedback and complaints
- ☐ EAP
- ☐ NSP

- ☐ All links tested
- ☐ Redirects confirmed working

4. News Configuration

- ☐ Unified news feed configured
- ☐ Corporate publishing permissions confirmed
- ☐ Site Champion publishing permissions confirmed
- ☐ First corporate article visible
- ☐ First AAL article loaded
- ☐ News layout approved

5. Document Hub Build

Library Structure

- ☐ Policies library created
- ☐ Procedures library created
- ☐ Forms library created
- ☐ Templates library created
- ☐ Brochures and handbooks library created
- ☐ Governance documents library created

Governance Controls

- ☐ Version control enabled
- ☐ Document owners assigned
- ☐ Permissions validated
- ☐ Confidential items excluded

6. Validation & Testing

Functional Testing

- ☐ All homepage links tested
- ☐ All tile links tested
- ☐ Mobile view tested
- ☐ Teams tab tested
- ☐ Access permissions tested
- ☐ No broken links identified

User Testing

- ☐ Site Champion walkthrough completed
- ☐ Team Leader walkthrough completed
- ☐ Field staff test completed
- ☐ Office staff test completed
- ☐ Feedback incorporated

7. Pre-Launch Readiness

- ☐ Final audit of naming completed
- ☐ Final link validation completed
- ☐ CEO message scheduled
- ☐ Launch article scheduled
- ☐ Support contact confirmed
- ☐ Quick reference guide finalised
- ☐ Training session scheduled
- ☐ Update induction pack to reference SharePoint only

8. Launch

- ☐ Site published
- ☐ Announcement sent
- ☐ Team Leaders briefed
- ☐ Quick guide distributed
- ☐ Support channel active
- ☐ Add SharePoint to desktop shortcuts

9. Post-Launch Monitoring – 2 Weeks

- ☐ Monitor “where do I find” queries
- ☐ Monitor Jira tickets
- ☐ Fix any broken links
- ☐ Reinforce usage in team meetings
- ☐ Publish tip of the week
- ☐ Confirm adoption with Site Champion

10. Close-Out

- ☐ No legacy “Multi” references remain
- ☐ Governance responsibilities confirmed
- ☐ Lessons learned captured
- ☐ Phase 3 completion recorded

Phase 2B – Vertaview Learn

Project Management Rollout Plan | Platform Alignment Within SharePoint

1. Overview

Vertaview Learn is the renamed learning platform formerly known as MultiLearn.

This rollout forms part of Phase 2 - Platform Alignment Within SharePoint.

The objective is to transition platform naming and branding within the SharePoint ecosystem while ensuring:

- No disruption to staff access
- No compliance impact
- No loss of training records
- No broken links
- Full removal of legacy naming within SharePoint

2. Project Objectives

- Implement approved Vertaview Learn branding
- Remove all Multilearn references within SharePoint
- Update SharePoint navigation and tiles
- Validate all LMS access links
- Update onboarding references
- Complete structured asset and link audit
- Obtain formal sign-off

3. Scope

In Scope

- SharePoint tile and navigation updates
- Link updates within Hub and entity sites
- Document Hub reference updates
- Onboarding document updates (SharePoint-hosted)
- Communications execution
- Stakeholder confirmation
- Validation and sign-off

Out of Scope

- LMS system redevelopment
- Course updates
- User permissions
- Compliance record migration
- External website changes

4. Workstreams

The rollout will be delivered across five structured workstreams.

Workstream 1 – Brand & Naming Finalisation

Owner: Marketing & LMS

Dependency: Brand approval

Activities:

- Confirm final platform name
- Confirm approved logo and tile asset
- Confirm navigation label
- Confirm platform descriptor text

Deliverable:

- Naming & Asset Confirmation Record

Workstream 2 – SharePoint Asset & Link Audit

Owner: Marketing

Support: LMS / IT

Activities:

- Identify all SharePoint references to MultiLearn
- Identify Hub-level links
- Identify entity-level references
- Identify onboarding references
- Identify embedded hyperlinks
- Log items in Phase 2 Audit Register

Deliverable:

- Completed Vertaview Learn Audit Register

Workstream 3 – Implementation

Owner: Marketing

Support: IT (if required)

Activities:

- Update Hub navigation
- Update Quick Access tile
- Replace legacy labels
- Replace logo assets
- Update Document Hub references
- Update onboarding material within SharePoint

Deliverable:

- Updated SharePoint references

Workstream 4 – Validation & Testing

Owner: Marketing

Support: IT / Test Users

Validation Checklist:

- Tile directs correctly
- Login process unaffected
- Redirect from old links works
- Teams integrations unaffected
- Onboarding links functional
- No visible MultiLearn references remain

Deliverable:

- Validation Sign-Off

Workstream 5 – Communication & Adoption

Owner: Marketing & LMS

Activities:

- Issue staff announcement
- Update Hub news
- Provide FAQ
- Brief Team Leaders
- Monitor support tickets

Deliverable:

- Communication Pack
- Monitoring Report

5. Timeline (Aligned to Charter)

Date	Activity	Owner
29 April	List of required digital assets and sizes	LMS Team
29 April	Training Hub markup and links	LMS Team
1 May	Digital assets supplied to LMS team	Marketing
1 May	Pre-staff comms to People & Culture, SLT advising the change	Marketing
5 May	Pre launch comms to all staff (new look training platform notice)	Marketing
7 May	Draft Training Hub shared with team	Marketing / LMS
7 May	All SharePoint changes completed (branding, colours, visual updates)	Marketing
9 May	Litmos changes and uploads completed	LMS Team
11 May	Final “we’re live” announcement to all staff	Marketing

Deliverables by 29 April

- Approved icon
- Homepage hero assets
- Certificate templates
- Email notifications
- LMS banner graphics
- SharePoint tile assets
- Style reference documentation

6. Dependencies

- Phase 0 Tenant Stabilisation complete
- Brand assets approved
- Hub structure stable
- Audit register finalised prior to entity site launch

7. Risk Management

Risk	Impact
Staff assume system change	Clear comms – no functional change
Broken links	Structured audit + testing
Mixed branding remains	Formal audit register
Onboarding references missed	Pre-launch onboarding review
Increased IT tickets	FAQ + reassurance messaging

8. Governance

- Platform Owner: LMS Lead
- SharePoint Alignment Owner: Marketing
- Technical Oversight: IT Lead
- Corporate Comms: Marketing

No structural changes permitted outside governance framework.

9. Success Criteria

Vertaview Learn rollout will be considered complete when:

- No MultiLearn references remain in SharePoint
- All links validated
- Onboarding documents updated
- Staff notified
- No spike in IT tickets
- Governance ownership confirmed

10. Transition to Business-as-Usual

Following stabilisation:

- LMS retains platform ownership
- Marketing closes Phase 2B register
- Governance updated
- Lessons learned captured for Vertaview Work rollout

11. Strategic Positioning

Vertaview Learn is a controlled alignment initiative designed to:

- Reinforce brand consistency
- Reduce structural fragmentation
- Protect compliance workflows
- Strengthen enterprise governance

It serves as the rehearsal model for the more complex Vertaview Work transition.

Phase 3 – Technical Implementation & Platform Update

Date	Activity	Owner
5-8 May	Upload assets to LMS staging	LMS Team
5-8 May	Apply branding across dashboards & certificates	LMS
8 May	Merge LMS environments (if applicable)	LMS
8 May	Create new Training Hub Sharepoint Page	Marketing
5-8 May	Update SharePoint Hub navigation & tiles	Marketing
Ongoing	Update onboarding documents hosted in SharePoint	People & Culture

Phase 4 – Communications & Change Management

To reduce confusion, comms should precede go-live by 24–48 hours.

1. All Staff Email

Messaging:

- Vertaview Learn is live
- Nothing has been removed or reset
- No training needs to be redone
- This strengthens our group identity

2. LMS Banner Announcement

“What’s changed” summary

3. SharePoint Hub News Post

Reinforce positioning:

- Shared systems = Vertaview
- Learning follows the person across entities

4. Open Minds Targeted Message

Additional reassurance:

- Courses unchanged
- Records unchanged
- This connects OM into a larger capability network

Suggested Communication Sequencing Strategy

To avoid confusion:

1. **No announcement before validation complete**
2. Leader briefing first
3. All-staff email
4. LMS banner reinforcement
5. SharePoint article reinforcement
6. FAQ support if required

Appendix A

Comms Brief

Overview

The training platform branding is changing from MultiLearn to Vertaview Learn. As part of the rebrand, it is undergoing a visual refresh to better align with the Vertaview brand and support a more consistent, united experience across the organisation. This includes updated branding elements and an improved Training Hub to better support onboarding and ongoing learning.

While the changes are significant visually, this is a branding update only. All existing training records, assigned learning, scheduled training, and functionality will remain unchanged.

This work reflects feedback we have heard from across the organisation regarding a disconnected online experience, particularly when onboarding new team member, and is another step towards creating a more unified experience.

Objectives

- Prepare leaders, HR teams, and staff for upcoming visual changes
- Reassure stakeholders that functionality and records remain unchanged
- Support a smooth transition with clear, phased communications
- Reinforce the role of Vertaview Learn in onboarding and workforce consistency
- Demonstrate that staff feedback has been heard and actioned

Audiences

- CEOs, Executive Leadership
- People & Culture teams
- All staff

Key Messages

People & Culture, & EL & SLT, CEO Communication (1 May)

- We are updating the Training Hub and LMS look and feel to better align with the Vertaview brand
- An all-staff communication will be sent on Monday to advise staff of the upcoming changes
- The work is visual only — functionality remains the same
- All existing training records, assigned training, and scheduled learning will remain in place
- These updates support a more united experience across teams and strengthen onboarding consistency
- This work reflects staff feedback and is a positive step forward

All-Staff Pre-launch (5 May)

- We are updating the look of our training platform over the coming weeks
- You may notice visual changes as updates are applied
- No action is required from staff
- We expect the updates to be completed by mid-May
- We'll confirm once everything is finalised

Launch / Post-launch (11 May)

The refreshed training platform is now live
What's new and improved (branding, visuals, Training Hub updates)
Reassurance that learning functionality remains unchanged
How to provide feedback to the LMS team

Tone & Style

Reassuring, clear, and confident
Aligned to a "one Vertaview" narrative
Plain language (no technical jargon)
Positive and forward-looking

Channels

Direct email to HR teams and CEOs (1 May)
All-staff email (pre-launch)
All-staff email (final announcement)
Sharepoint NEWS item
Newsletter Article (all entity newsletters)
Training Hub banner or LMS notification

Key Dates

Date	Target Audience	Message
1 May	P&C, CEO, SLT/EL	Prenotification it is happening
5 May	All Staff	Notification we are updating the platform
11 May	All Staff	Update is complete – here is what has changed

Success Measures

Leaders are confident in messaging and reassurance
Minimal staff confusion or support queries
Positive staff engagement with the refreshed Training Hub
Clear feedback captured by the LMS team

Site Champion Training Program

1. Training Purpose

This training prepares Site Champions to:

- Confidently manage their entity SharePoint site
- Publish and maintain local content
- Protect brand integrity
- Uphold confidentiality standards
- Operate within the Vertaview governance framework

Site Champions are custodians — not just content uploaders.

2. Training Objectives

By the end of this session, Site Champions will:

- Understand their role and responsibilities
- Know what they can and cannot publish
- Be able to create, edit and delete news posts
- Maintain Document Hubs
- Identify and escalate issues
- Maintain link integrity
- Protect confidential and sensitive information

3. Training Structure

Recommended duration: 90 minutes

Delivery: Live session + recording + quick reference guide

Module 1 – Role of the Site Champion

Overview

- What is a Site Champion?
- Why the role exists
- How it supports sustainability
- Difference between Corporate News and Entity News

Responsibilities

- Publish local news
- Maintain documents
- Review outdated content
- Escalate structural issues
- Protect brand and privacy

What Site Champions Do NOT Do

- Change Hub navigation
- Alter platform naming
- Override governance
- Upload confidential HR or client-sensitive data
- Make structural system changes

Module 2 – SharePoint Basics (Entity Site View)

Understanding the Layout

- Homepage structure
- News web part
- Quick links
- Document Hubs
- Platform tiles (Amplify, Learn, Work)

Navigation Rules

- Do not alter top-level structure
- Use consistent naming
- Follow approved layout

Module 3 – Publishing News Posts

When to Publish

Appropriate examples:

- Local team activities
- Group events
- Community engagement
- Training completed
- Staff recognition

Not appropriate:

- HR investigations
- Client-specific information
- Sensitive performance issues
- Confidential complaints

How to Create a News Post

Step-by-step walkthrough:

1. Create new post
2. Add title
3. Upload approved image
4. Write clear summary
5. Check formatting
6. Tag correctly (if applicable)
7. Publish

Editing & Deleting

- How to update a post
- When to archive
- Removing outdated content

Module 4 – Document Hub Management

What Belongs in the Document Hub

- Templates
- Meeting minutes (non-confidential)
- Approved forms
- Branding assets

What Should NOT Be Uploaded

- Client files
- HR files
- Payroll data
- Sensitive compliance reports

Version Control

- Do not duplicate documents unnecessarily
- Remove outdated versions
- Confirm file naming conventions

Module 5 – Confidentiality & Governance

Confidentiality Standards

- SharePoint is internal but not private
- Do not publish identifiable client information
- Do not publish disciplinary matters
- Be mindful of privacy laws

Brand Protection

- Use approved logos only
- Do not alter platform names
- Do not create alternative naming conventions

Escalation Pathway

If unsure:

- Pause publication
- Contact Marketing & Communications
- Escalate to Project Lead

Before Publishing:

- Check all hyperlinks
- Test document downloads
- Check spelling
- Confirm image permissions
- Validate formatting

Broken Link Reporting

- How to identify
- Who to notify
- Logging process

Module 7 – Post-Launch Responsibilities

Site Champions should:

- Review site monthly
- Remove outdated content
- Monitor document currency
- Confirm links remain active
- Participate in quarterly review

4. Supporting Materials

Provide each Champion with:

- Quick Reference Guide (2 pages max)
- Governance Checklist
- Publishing Checklist
- Escalation Contact List
- Audit Register template

5. Ongoing Support Model

- Quarterly check-in sessions
- Annual refresher training
- Governance updates as required
- Direct contact pathway to Group Services

6. Assessment & Confirmation

At the end of training:

- Champion confirms understanding
- Governance acknowledgement signed
- Access level confirmed
- Added to Site Champion Register

7. Success Indicators

Training is successful when:

- Champions publish independently
- No inappropriate content incidents
- Reduced dependency on Group Services
- Clean Document Hubs maintained
- Minimal broken link incidents

8. SharePoint Site Champion

Role Purpose

The SharePoint Site Champion is responsible for maintaining the integrity, accuracy and governance of their entity's SharePoint site within the Vertaview SharePoint framework.

- The role ensures that entity-level content is:
- Accurate
- Up to date
- Brand-aligned
- Free from legacy references
- Compliant with confidentiality requirements

The Site Champion supports long-term sustainability by reducing reliance on Group Services for day-to-day content management.

Key Responsibilities

1. Content Management

- Create and publish entity-specific news posts
- Edit or archive outdated content
- Maintain document accuracy within the entity Document Hub
- Remove redundant or outdated files
- Ensure appropriate use of branding assets

2. Governance & Compliance

- Ensure no confidential, sensitive or client-identifiable information is published
- Follow approved naming conventions
- Escalate concerns or uncertainty prior to publishing
- Maintain consistency with Vertaview brand standards
- Participate in governance reviews when required

3. Link & Quality Assurance

- Validate hyperlinks before publishing
- Report broken links to appropriate contact
- Confirm platform links (Amplify, Learn, Work) remain accurate
- Participate in periodic audit reviews

4. Collaboration

- Coordinate with Marketing & Communications for corporate-level news
- Liaise with Project Lead for structural or technical changes

- Support staff in understanding how to use the entity site

Authority Level

- The Site Champion may:
- Publish and edit entity news posts
- Upload and maintain approved documents
- Manage entity-level content

The Site Champion may NOT:

- Alter Hub-level navigation
- Change platform naming conventions
- Upload confidential HR or client files
- Modify governance policies
- Make structural changes to the SharePoint environment

All structural changes must be escalated.

Skills & Attributes

The Site Champion should:

- Be detail-oriented
- Have strong written communication skills
- Understand basic SharePoint editing functions
- Demonstrate discretion and confidentiality
- Be comfortable reviewing documents for accuracy
- Show commitment to maintaining standards

Time Commitment

Estimated time requirement:

- Initial training: 90 minutes
- Ongoing maintenance: Approximately 1–2 hours per month
- Additional time during major updates or audits

This is not a full-time role. It is an allocated governance responsibility within an existing position.

Training & Support

Site Champions will receive:

- Formal onboarding training
- Publishing checklist
- Governance quick reference guide
- Access to escalation support
- Periodic refresher training

Performance Expectations

A successful Site Champion:

- Maintains accurate and current content
- Publishes appropriate and engaging entity updates
- Prevents governance breaches
- Supports staff adoption
- Reduces reliance on Group Services
- Identifies and escalates risks early

Review & Accountability

The Site Champion role will be reviewed:

- Quarterly during rollout period
- Annually as part of governance review

If governance breaches occur, escalation will follow entity management and corporate governance pathways.

9. Governance Escalation Pathway

Vertaview SharePoint – Entity Site Governance

1. Purpose

The Governance Escalation Pathway provides a clear, structured process for managing:

- Content uncertainty
- Governance risks
- Confidentiality concerns
- Structural change requests
- Technical issues

It ensures that decisions are made at the correct level of authority while maintaining compliance and brand integrity.

2. Guiding Principle

If a Site Champion is unsure whether something should be published, altered or removed:

Pause. Escalate. Confirm.

No sensitive or structural change should be made without appropriate approval.

3. Escalation Categories

Escalations fall into four defined categories:

1. Content & Publication Risk
2. Confidentiality & Privacy Risk
3. Structural or Navigation Changes
4. Technical & System Issues

Each category has a defined pathway.

4. Category 1 – Content & Publication Risk

Examples:

- Sensitive wording
- Negative operational events
- Staff disputes
- Public-facing reputational risk
- Content that may impact other entities

Escalation Path

Site Champion → Marketing & Communications → Entity Executive (if required)

Decision Authority

Marketing & Communications (corporate content control)

Entity Executive (if reputational or strategic risk)

5. Category 2 – Confidentiality & Privacy Risk

Examples:

- Client-identifiable information
- HR matters
- Payroll or performance data
- Complaints or investigations
- Medical or sensitive personal information

Escalation Path

Site Champion → Entity Manager → HR / Governance / Privacy Officer (if required)

Decision Authority

HR / Governance Lead

No such content should ever be published without formal confirmation.

6. Category 3 – Structural or Navigation Changes

Examples:

- Changing navigation labels
- Adding new top-level menus
- Removing platform tiles
- Reordering Hub elements
- Adding new system integrations

Escalation Path

Site Champion → Project Lead → IT / Marketing (if required)

Decision Authority

Project Lead in consultation with IT

Structural consistency must be maintained across all entities.

7. Category 4 – Technical & System Issues

Examples:

- Broken links
- Platform not loading
- Permission errors
- Document access issues
- Teams tab malfunction

Escalation Path

Site Champion → IT Support (via Jira) → Notify Project Lead

High-impact issues must be logged immediately.

8. Escalation Decision Matrix

Scenario	Publish?	Escalate?	Who Decides?
Team social event	Yes	No	Site Champion
Staff recognition	Yes	No	Site Champion
Client story with identifiable details	No	Yes	HR / Governance
Complaint discussion	No	Yes	HR / Governance
Broken link	No	Yes	IT
Rename platform label	No	Yes	Project Lead
Add new navigation section	No	Yes	Project Lead
Policy update	Yes (if approved)	Confirm	Entity Manager

9. Timeframes for Escalation

- Low Risk: 2 business days
- Medium Risk: 1 business day
- High Risk (privacy / system failure): Immediate

10. Documentation of Escalations

All escalations should be recorded in:

- Governance Log (maintained by Project Lead)
- Jira ticket (for technical issues)
- Email confirmation trail

This ensures traceability and audit protection.

11. Non-Compliance Procedure

If inappropriate content is published:

- Immediate removal
- Notify Entity Manager
- Notify Project Lead
- Governance review
- Refresher training (if required)

This protects the organisation and reinforces standards.

12. Escalation Contact Points

- Marketing & Communications
- Project Lead
- IT Support (Jira)
- HR / Governance Lead
- Entity Executive

13. Success Indicators

The escalation pathway is effective when:

- No privacy breaches occur
- No structural inconsistencies emerge
- Issues are resolved quickly
- Site Champions escalate appropriately
- Governance decisions are documented

14. Cultural Framing

Escalation is not failure.

Escalation is responsible governance.

The goal is:

- Protect the organisation
- Protect clients
- Protect staff
- Maintain brand integrity
- Maintain structural consistency