



Success Story

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How Food Service Giant Safeguarded Client’s Sensitive Information Using Connecting Software’s Solution



Customer
Compass Group PLC

Headquarters
Surrey, UK

Activity
Contract foodservice

Products and Services
CB Dynamics CRM - Sharepoint Permissions Replicator

When you are the leader in your industry, every work process needs to run as smoothly as possible. Compass Group PLC knows what it means. It is the largest contract foodservice company in the world operating in about 50 countries and employing over 550,000 people. Compass Group not only provides food services to thousands of clients around the world but also contributes to such noble goals as fighting hunger, reducing ecological footprint and promoting gender equality. Connecting Software has taken a special pride in facilitating an important business process for the food service giant.

“It was unacceptable to allow unrestricted access to sensitive documentation in SharePoint or to manage it manually.”
Anthony Crook, Head of Client Business Solutions Compass Group PLC

The Problem

Many companies use Dynamics 365 for managing customer relations integrated with SharePoint to store and process documents. It is a cost-effective pair that facilitates team collaboration – with one huge downside: privileges and permissions are not synchronised. It means that any sensitive data stored in Dynamics like salaries, contract values, signatures and stamps is available to SharePoint users even if it is restricted in Dynamics 365. And it was exactly the case for Compass Group.

“The main pain point that led us to Connecting Software’s solution was the need for synchronisation. Our CRM system was such a large global roll out. We spanned multiple countries, teams and territories with one system. Out-of-the-box Dynamics 365 has very powerful security capabilities and a robust SharePoint integration. But our challenge was bringing these two areas together. Our in-country users deemed it unacceptable to restrict access to sales or contract information to specific teams in CRM but then allow unrestricted access to the related documentation in SharePoint. Or to have to manage this manually. Our implementation partner at the time suggested Connecting Software as a possible remedy to this issue”, says Anthony Crook, Head of Client Business Solutions for Compass Group PLC.

At the beginning, the company was not aware of the missing security integration between Dynamics and SharePoint.

“We identified the gap in the Dynamics 365 to SharePoint security model fairly late in the implementation. User acceptance testing was already started. This integration wasn’t a critical factor in the implementation but the gap in security did prevent the use [of] SharePoint for storing documents via Dynamics 365”, continues Anthony Crook.

The Solution

Compass Group addressed Connecting Software for our Dynamics CRM to SharePoint Permission Replicator. It is the only out-of-the-box solution in the

world that automatically synchronises privileges and permissions between Dynamics CRM and SharePoint. It means that any sensitive data is available in SharePoint only to those users who are granted access to it in Dynamics. The CB Replicator is very easy to install, and it doesn’t require any excessive maintenance.

Preventing Potential Catastrophes

How critical was it for Compass Group to synchronize permissions and privileges automatically?

“We mostly hold sales and contract information in CRM. Managing data access is key for ensuring that users only have access to the data they are allowed. As people come and go, it’s important that no one has access to more information than they require to do their job. Thus if people either accidentally or purposefully try, they cannot over share our client’s information. On top of this we manage one central global solution. And each country wants to be confident that they can still operate securely as if they still used a local owned solution”, explains Anthony Crook.

Another important aspect of managing personal data of clients is compliance with the General Data Protection Regulation (GDPR).

“A core part of GDPR is data access and privacy. So replicating our user access management policies across all solutions is key for managing our obligations to our customers and employees. Doing this however needed to remain as easy to manage and administer as possible”, adds the representative of Compass Group.

CB Permission Replicator ensures keeping the same level of document confidentiality in both systems – Dynamics CRM and SharePoint – automatically, without any extra management of access rights required.



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