



Orchestra

## CASE STUDY

# Maine Source Homes Streamlines Project Management

and Positions for Growth with Work Made  
Simple in Microsoft 365 by Orchestra



We have talked a lot about ways to manage growing our business. With this new system leveraging Orchestra, we now see that we can manage everything we need even with agents working from home or on the go. It's been an absolute game-changer."



– Mark Turner, President Maine  
Source Homes

### KEY HIGHLIGHTS:

**\$200,000 USD**  
deployment costs  
eliminated

**Self-provisioning**  
teams/sites enabled  
and adopted

**\$16,000**  
consulting/customization  
saved per team/site

# • Introducing Maine Source Homes



INDUSTRY:

**CONSTRUCTION  
& REALTY**

Maine Source Homes are a one-stop-shop for buying a home in Maine. Whether you are looking to buy a home or build a new one, Maine Source has the expertise to help.

[Maine Source Homes](#) is a custom home & realty company that helps you find the right home ownership solution for you. With more than 40 years of experience in both new home construction and in real estate in Maine, the Maine Source Homes team helps people buy, sell, or build and provides expert assistance every step of the way.

# In Partnership with Sympraxis Consulting

In partnership with Orchestra, Sympraxis Consulting revolutionized Maine Source Homes' experience with Microsoft 365, making it easier than ever for employees to communicate and collaborate from the office or on the go. A small company with limited technical ability, the perfect solution for Maine Source Homes would need to be easy to implement and use, requiring very little time to maintain internally. That is exactly what Sympraxis Consulting delivered by introducing Orchestra for their Microsoft 365 governance, provisioning and templating needs.

Sympraxis Consulting is a team of experienced professionals and Microsoft MVPs who create and configure Microsoft 365, SharePoint, and Azure solutions. Experts in project management, information architecture, knowledge management, development, and administration, this group of passionate technologists ensures they understand the “why” before working on the “how” to build the best solutions for your business.

**SYMPRAXIS**  
CONSULTING



# Maine Source Homes' Project Management and Technology Challenges

Maine Source Homes are a one-stop-shop for buying a home in Maine. This can make the process of setting up, managing, communicating and collaborating on each home project (e.g. buy, sell, build) extremely complicated and critical to manage. Between client and agents, project managers and trades, as well as broker and agent, the many conversations, communications and documents required for each buy/sell/build of a home vary. This presented a challenge from a project management, communication, collaboration and documentation perspective.

Julie M. Turner, Partner and CTO of Sympraxis Consulting, describes their client Main Source Homes' unique business model, sharing,



*Maine Source Homes aren't just a realty company – there is a crossover between buyers that want to buy, and those that want to build, plus the home selling aspect as well. Depending on the avenue they take, the process can be very different, making the workflow complex. On top of this, the team at Maine Source homes have very little time or technical understanding, so any solution needs to be user-friendly, simple and easy to adopt across the organization”.*

Internally, the crossover between both realty and construction adds a layer of complication to Maine Source Homes' customer workflows, communications and team collaboration. Depending on which category a customer falls under, homebuyer or home builder, a different workflow is required.



These project and customer workflows were previously managed in SharePoint by using sub sites and breaking down inheritance, but this was proving to be very complicated, difficult to manage, and simply unsustainable in the long run. On top of this, Maine Source Homes are a very small organization with limited technical experience or resources.

Jon Mercier, Designated Broker of Maine Source Homes, explained, “we aren’t the most technically savvy bunch, with agents ranging from baby boomers down to millennials, so anything involving adopting new technology systems can be tough. Many of our agents are used to doing contracts on paper, we needed to find a way to track everything we are doing digitally while working with a simple, user-friendly interface”.

With this in mind, Maine Source Homes’ new customer/project management solution needed to be:

- ✓ **Simple to use, train and adopt across the organization.**
- ✓ **Cross the project chasm of homebuyers and homebuilders.**
- ✓ **Centralize all client communications for tracking and compliance.**
- ✓ **Streamline client/project management leveraging the best of Microsoft 365.**
- ✓ **Build common workflows and communications into a templated best practice.**



“

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**Jon Mercier, Designated  
Broker of Maine Source Homes**



# Maine Source Homes' Project Goals

Maine Source Homes' previous technical solution left huge room for improvement. According to Julie M. Turner of Sympraxis Consulting, "the way Maine Source Homes was dealing with customer workflows previously was not sustainable in the long run. It required constant management and customization, provided no modern features, and isn't easily accessible when on the go or working from home – an issue that became critical when the COVID-19 pandemic hit".

It was crucial for Sympraxis Consulting to provide a solution to Maine Source Homes that was:



**USER FRIENDLY** – the Maine Source Homes team didn't have much technical experience, making a user-friendly, high-adoption solution a must.



**EASY TO MANAGE** – Maine Source Homes operates with a small but mighty team, which made it important to ensure they could manage the day-to-day solution in-house without requiring a new hire.



**ACCESSIBLE ON THE GO** – the Maine Source Homes team works predominantly remotely and on the go, so it was vital for the solution to be accessible whenever and wherever required.

Upgrading to Microsoft 365 presented a huge opportunity for Maine Source Homes to improve their communications and efficiency. Emily Mancini, UX Certified Architect at Sympraxis Consulting, expressed,



*there were many incentives to move to a new structure. We wanted to provide a solution that gave Maine Source Homes added independence by being able to manage it themselves. Also, we wanted to centralize communications to provide greater transparency and communication amongst their team".*

# Orchestra Makes Work Simple for Maine Source Homes in Microsoft 365

Sympraxis Consulting revolutionized the way Maine Source Homes managed customer workflows/project management in Microsoft 365 by creating custom Workspace Templates with Orchestra. Sympraxis Consulting introduced a simple site structure with one template for home buyers & home sellers while creating a separate template for new build construction clients.

Sympraxis Consulting rolled out six major templates that overhauled the way Maine Source Homes manages, communicates and collaborates on each project, which includes the stringent level of security and compliance required to meet the Maine Real Estate Commission regulations/standards:

1

**Customer Manager Template**

– a central site, or intranet, for reviewing all projects, customers and transactions in a centralized location.

2

**Customer Team/Site Template**

– this team/site is created for each buy/sell home project to manage, communicate and collaborate in a streamlined, centralized location, which is powered by Orchestra.

3

**New Build Customer Team/Site Template**

– this team/site is created for each new build home project to manage, communicate and collaborate in a streamlined, centralized location, which is powered by Orchestra.

4

**Customer Manager Template**

– a customer facing extranet that surfaces planner tasks so that customers can stay up to date with the progress of their new home build, included as part of the New Build Customer Team/Site, which is powered by Orchestra.

5

**Active Transactions Hub**

– a collection of four hub sites for each transaction status to move a site as each status is achieved.

6

**New Transaction Form**

– the starting place for a new transaction, once a customer is selected all the details can be updated and added to the transaction list.





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*This not only saved a ton of time, but also allows us to easily update templates to adapt to their changing needs. To me, this was the most powerful thing and provided the best solution for our client."*

**Julie M Turner,**  
**Sympraxis Consulting**



Now, Maine Source Homes can easily create a new team/site for every new customer. Thanks to Orchestra's Workspace Templates, Workspace Provisioning and Microsoft 365 Governance capabilities, Maine Source Homes has all the elements needed to successfully manage the workflow, including buying, selling and building task lists, as well as document templates and modular details lists.

"I could have written a custom provisioning solution, but because Maine Source Homes didn't really know what they wanted," explained Julie M Turner of Sympraxis Consulting. "I was drawn to Orchestra's ability to be able to update and edit Workspace Templates. This not only saved a ton of time, but also allows us to easily update templates to adapt to their changing needs. To me, this was the most powerful thing and provided the best solution for our client."

Utilizing the core capabilities of Orchestra, Sympraxis Consulting was able to yield significant cost savings for Maine Source Homes, including an **initial upfront savings of \$16,000 USD** leveraging Workspace Templates by eliminating approximately 65 custom implementation hours.

Moving forward, Maine Source Homes saves additional 4 to 8 consultation and customization hours each time they provision a Customer Team/Site or Build Customer Team/Site using Orchestra, **upwards of \$2,000 USD for each team/site provisioned**. At the current rate of new customer growth, Maine Source Homes are creating at least 2 new teams/sites each week, **an estimated total cost savings of \$200,000 USD annually**.

**INITIAL UPFRONT SAVINGS OF**  
**\$16,000 USD**  
**LEVERAGING WORKSPACE**  
**TEMPLATES**

**MAINE SOURCE HOMES SAVES**  
**UPWARDS OF**  
**\$2,000 USD**  
**FOR EACH TEAM/SITE**

**ESTIMATED TOTAL COST**  
**SAVINGS OF**  
**\$200,000 USD**  
**ANNUALLY**





# What Is Orchestra?

**Orchestra** makes work simple in Microsoft Teams and SharePoint Online, as well as across Microsoft 365 with a comprehensive enablement, adoption and standardization platform that empowers IT Administrators and organizations to define a Microsoft 365 adoption and change management strategy.

One of the many game-changing features within the Orchestra platform is its pre-built Workspace Templates. Workspace Templates for Microsoft Teams and SharePoint Online come fully configured for common business scenarios. Workspace Templates in Orchestra allow you to leverage our pre-built, best-practice Workspace Templates, such as the Project Management Workspace Template, or easily create your own Microsoft Teams or SharePoint Online Workspace – saving you time, money and headaches.

Getting started with Orchestra is quick and simple. Julie M. Turner of Sympraxis Consulting, shares her experience saying, “deployment time for Orchestra was nearly non-existent! We figured everything out by just playing around the platform – it was really intuitive and easy to use. Beyond this, there was no further work required to get Maine Source Homes up and running with Orchestra.”

Sympraxis Consulting deployed Orchestra for Maine Source Homes as part of a wider project updating the organization’s Microsoft 365 capabilities and implementing Microsoft Teams. Sympraxis Consulting included Orchestra as a core piece of Maine Source Homes’s digital workplace in order to ensure consistency across workflows, and to provide them with a solution that was simple to manage long after their working partnership on this project ended.

Proud of the outcomes Sympraxis Consulting was able to yield Maine Source Homes from the implementation of new Workspace Templates with Orchestra, Emily Mancini of Sympraxis Consulting shares,



*I would confidently say that using Orchestra was ten times faster than the time it takes to run the PNP provisioning export, edit that template and test making that site. All and all a significant time, cost and resources savings for Maine Source Homes”.*

“

One real estate agent can only do so much. To grow our business, getting new agents on board is essential.

A key part of getting new agents of the highest quality is adding value with the systems and infrastructure that we have available,” explained Jon Mercier, Designated Broker at Maine Source Homes. “Having this system in place makes it so much easier for our agents to do what they need to do from wherever they are, allowing us to be more productive as well as adding value to our team.”

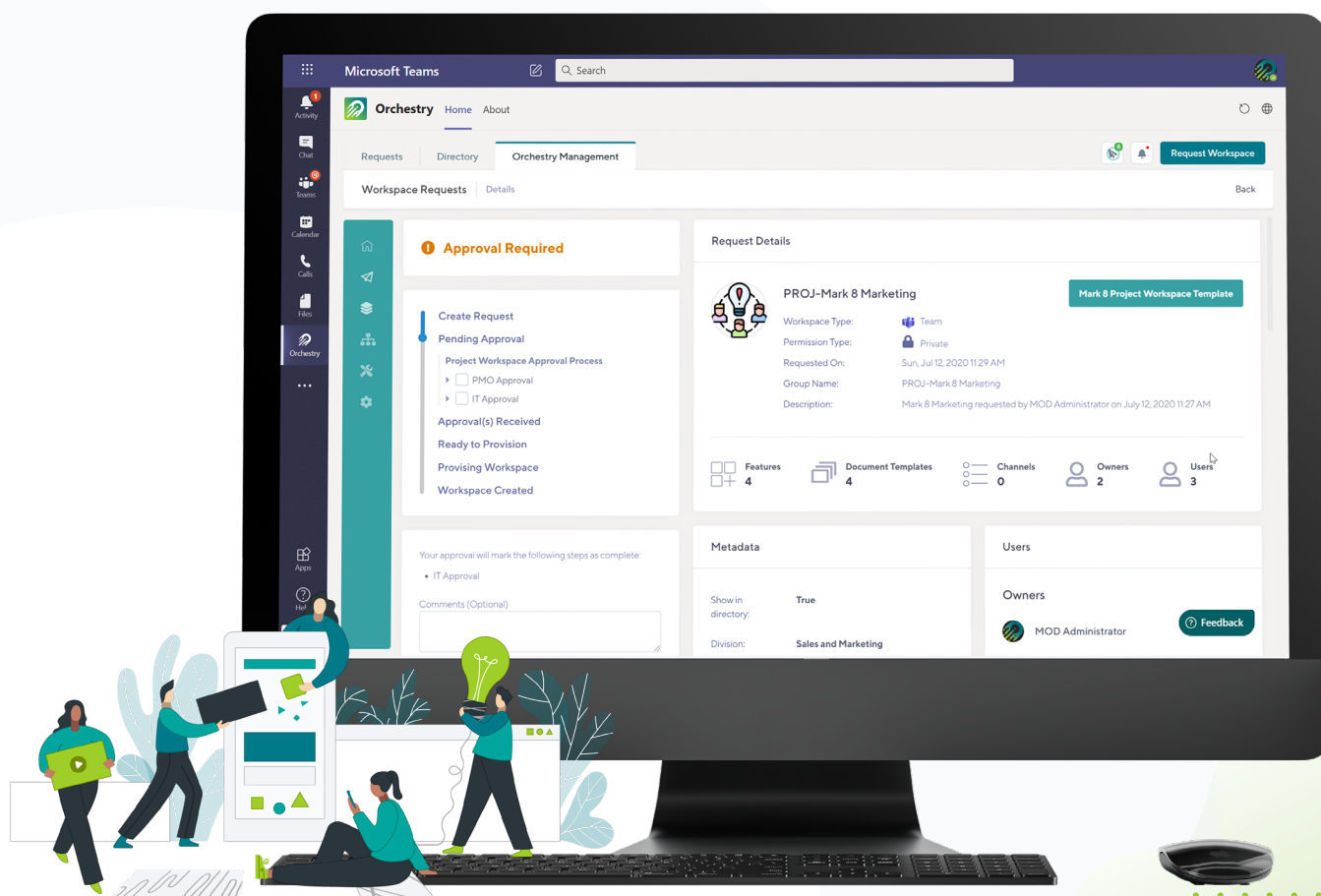
# Maine Source Homes Prepares to Expand Business for Growth with Orchestra

Since Sympraxis Consulting implemented Orchestra as part of the overhauled Microsoft 365 solution for Maine Source Homes, creating a consistent digital workplace across SharePoint Online, Microsoft Teams and Microsoft Planner, Maine Source Homes feel more confident about their ability to expand their business, grow their team, and onboard new agents to work remotely.



Using Orchestra has enforced consistency across channels, improving their internal communication and making processes more efficient. Additionally, the ease-of-use of Orchestra has allowed them to take control of their templates and make changes as their requirements change.

Even though Maine Source Homes is a self-proclaimed non-technical organization, thanks to Orchestra, and the outstanding work of their technology partner Sympraxis Consulting, they are able to self-provision new teams/sites that fulfill all their requirements without relying on an external IT partner to undertake timely and costly custom development projects.



According to Emily Mancini of Sympraxis Consulting,



*Orchestra gave us the ability to templatize and build consistent sites for Maine Source Homes, and then hand it over to them so they can manage and tweak their sites internally in the long run. This has given Maine Source Homes a lot more control than they would have had otherwise”.*

# Empowers Users to Take Control With Orchestra



In comparison to building a custom solution for Maine Source Homes, Orchestra saved Sympraxis days of custom coding, allowing them to provide a much faster and more affordable solution. Emily Mancini, Sympraxis Consulting, explained that “being able to better empower your end users with varying levels of technical abilities to make their own template without coding and edit them over time as their business changes is really important. Orchestra helps customers find a better way so they can avoid repetitive tasks, and can empower any site owner to create new templates within the organization’s pre-set governance conditions”.

More importantly, it has empowered Maine Source Homes to take control of their digital workplace, so they can communicate more efficiently, simplify customer workflows and ultimately grow their business.

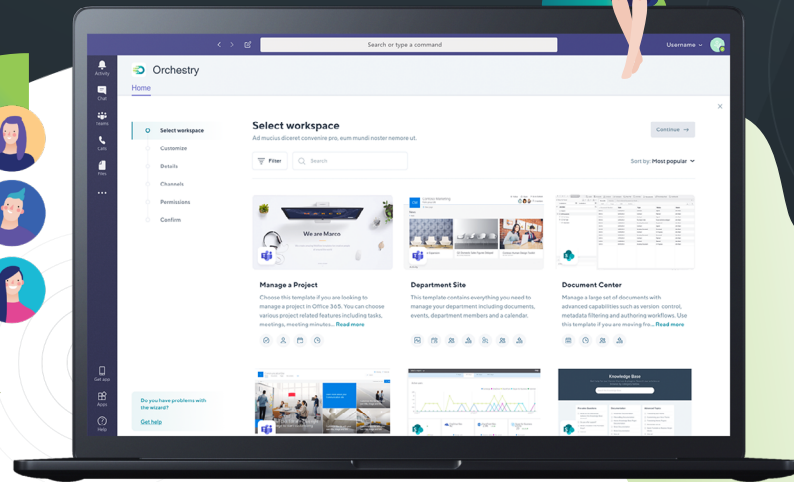
Mark Turner, President of Maine Source Homes, claims,



*we have talked a lot about how we are going to grow our business. With this system, we have seen that we can manage everything we need even with consultants working from home or on the go. **It's been an absolute game-changer.***



# Work Made Simple with Orchestra



Yet one more communication, collaboration or information tool complicates the over digitalized workspace for your employees. Orchestra eliminates the disorder, confusion and indecision of too many choices, making work simple, getting you to the right Microsoft 365 tool at the right time, for the right purpose.

Orchestra makes work simple in Microsoft Teams, SharePoint Online and across Microsoft 365 with its comprehensive enablement, adoption and standardization platform that empowers IT Administrators and organizations to define a winning Microsoft 365 adoption and change management strategy. Built by SharePoint MVPs and Office 365 experts, Orchestra helps organizations formulate the roadmap of 'what to use when' in Microsoft 365 increasing technology adoption, empowering governance, and simplifying provisioning organization-wide.

Ask us how at [hello@orchestra.com](mailto:hello@orchestra.com) or get FREE access at <https://www.orchestra.com>.

**GET FREE ACCESS!**

Orchestra – Work Made Simple in Microsoft 365, Microsoft Teams and SharePoint Online.