



SharePoint, Simplified: Chicago's SMB Guide to Organized, Secure Work



Let's talk about Taylor.

Taylor leads a busy nonprofit that works to improve population health across Chicago.

Every day, the team manages health program plans, grant applications, partner communications, community outreach data – you name it.

Some files are saved on personal laptops. Others sit in shared drives or a random Dropbox account. And too many are buried in long email threads, with confusing names like:

Final-Final-v7-REALLY-FINAL.docx

When a healthcare partner calls needing an update, chaos breaks out:

Who's touched the file last? Is someone editing it right now? Where is the updated version stored?

Taylor and the team lose hours each week chasing documents, confirming changes, and retracing steps. It's stressful. Deadlines get tight. Work bleeds into evenings.

But none of that has to happen.

There's a smarter way to organize, share, and collaborate – and it's already included in Microsoft 365.

It's called [SharePoint](#).

What SharePoint actually does?

Like many growing organizations, your files probably live in far too many places. Some sit on someone's laptop. Some are stashed in a shared drive at the office. Others are buried in long email threads or tucked away in a partner's Dropbox or OneDrive.

When documents are scattered everywhere, staying organized becomes way harder than it needs to be. People waste valuable minutes searching for the right version. Two coworkers accidentally edit different copies. No one is entirely sure which file is up to date – or who last touched it.

That's exactly where SharePoint comes in.

SharePoint is a Microsoft platform that gives your organization one central, secure home for storing, organizing, and sharing documents. Imagine a digital file cabinet that never gets messy – easy to search, always current, and accessible only to the right people, no matter where they're working from.

Because SharePoint runs in the cloud, your files aren't tied to a single device or physical location.

Whether your team is at a clinic, a school, a city office, working from home, or meeting with a partner in the community, they can get the information they need quickly and securely – as long as they have permission and an internet connection.

One of its greatest strengths: **everyone works on the same version.** There's no confusion over which copy is "final-final," and no need to email documents back and forth. Multiple contributors can even work inside the same file at the same time – chat, comment, and collaborate without roadblocks.

And SharePoint does more than just file storage. You can build internal hubs like staff resource centers, HR policy sites, training pages, or a news space that keeps everyone aligned. Everything stays neatly organized and protected behind Microsoft security.

If your organization already uses Microsoft 365 – Word, Excel, Teams, Outlook – you most likely already have SharePoint included. Many teams simply haven't taken advantage of it yet.

At its core, SharePoint helps your people work smarter together. It cuts confusion, saves time, and adds structure to the important work you do every day. And for a mission-driven organization trying to operate efficiently and deliver measurable impact, that can make a huge difference.

Day-to-day **benefits for you'll feel**



When your files are scattered or poorly organized, your day can feel like one long hunt for the right information. You know the document exists... but where is it? And is it even the latest version?

SharePoint eliminates that guessing game and gives your team confidence in the tools they use every day.

✔ Quick access to what matters
Instead of clicking through endless folders, people can instantly find files, resources, and pages using SharePoint's fast and smart search.

✔ Collaboration that actually feels collaborative
No duplicates, no version chaos. Everyone edits the same file at the same time – no emailing attachments or comparing notes to merge changes later.

✔ Clear structure across the business
Create spaces for different teams or departments. Policies, templates, and approved content stay organized and always up to date.

✔ Work from anywhere without roadblocks
Whether someone is traveling, hybrid, or remote, SharePoint keeps them connected to their workflow just as if they were at their desk.

✔ Less frustration, more focus
When people can get their work done with fewer obstacles, they stay productive – and happier.

Small improvements like these may not sound groundbreaking, but they make a real difference in how smoothly your business operates day after day. SharePoint removes noise and clutter so your team can stay focused on what drives results.

A photograph of a person's hands holding a white rectangular sign. The sign has the text 'WORK SMARTER NOT HARDER' written in a bold, dark blue, serif font. The background is a soft-focus image of a person's torso and arms, wearing a light-colored shirt, against a teal background.

**WORK SMARTER
NOT HARDER**

Under the hood **sites, libraries & lists**

You don't need to be an IT expert to benefit from SharePoint. But knowing a little about how it's structured can help your business get more value from it. SharePoint is built around a few key components that work together to keep everything organized and secure.

Sites

In SharePoint, each department, team, or major project can have its own site. Think of sites as workspaces where the right people gather resources and collaborate. A site might hold documents for your HR team, communication tools for your operations department, or files related to a major client initiative. Each site can be customized with layouts, pages, lists, and permissions that match how your business works.

Document Libraries

This is where files live. Unlike traditional folder systems, document libraries give you extra features that make everyday work easier. You can quickly filter and search to find exactly what you're looking for, add custom tags, track who edited what, and automatically organize files based on rules you set.

Lists

Lists act like simple databases. They're perfect for tracking things such as onboarding tasks, inventory, project timelines, equipment checkouts, surveys, or records your business needs to manage. Lists make it easier to keep important data accurate and visible without juggling spreadsheets.

Integration makes everything feel connected

One of SharePoint's biggest strengths is how well it works with the Microsoft 365 apps you already rely on. When you share a file in Teams, you're actually working with SharePoint in the background. When you save a document in OneDrive and share it with others, SharePoint manages the permissions and keeps everything organized. It's the engine powering your collaboration.

SharePoint is designed to scale as your business grows. Start with a single site or library and expand as your needs evolve. With a thoughtful setup, it becomes the foundation that supports communication, file management, and secure teamwork across your entire organization.



Real-world ways to use it



SharePoint can make a real difference in your everyday operations – not through flashy features, but through practical improvements that save time and reduce stress.

A central hub where everyone can find what they need

Instead of storing policies, templates, and reference documents in a dozen different places, SharePoint brings them together in one well-organized location. Staff don't have to ask around or dig through old emails to find important information. A quick search gives them exactly what they need, when they need it.

A collaboration space for active projects

Whether you're developing a new product, supporting clients, or coordinating a company event, SharePoint keeps all project files, deadlines, and tasks in one place. Everyone involved can access the latest materials, share updates, and comment in real time. This reduces confusion, eliminates duplicate work, and helps teams hit their goals faster.

Secure sharing outside your organization

Sometimes you need to exchange files with people who aren't part of your business – like partners, contractors, or clients. SharePoint lets you share documents safely and selectively. You decide exactly who can view or edit each file, and you can remove access at any time

Flexible tools to manage business data

SharePoint lists are perfect for tracking workflows and data without relying on complicated spreadsheets. You can build lists for things like training completion, vendor contacts, customer requests, equipment checkouts, or any information your business needs to keep current. Lists keep data organized and easy to update, even for users who aren't tech-savvy.

Internal pages that boost communication

SharePoint can serve as an internal information hub for business updates, upcoming events, announcements, or helpful resources. It keeps your staff looped in, even if they work remotely or travel often.

SharePoint isn't just a place to store documents – it supports the way your business operates. And when information is easier to find, easier to share, and easier to manage, your team can stay focused on doing their best work.



Security & permissions: **Control without chaos**

Your files are among your business's most valuable assets – client information, financial data, internal plans, and everything that keeps operations moving. SharePoint is built to protect that data while still making it easy for the right people to get to it when they need it..

Smart access controls

Not everyone in your business needs to see everything. With SharePoint, you can easily grant or restrict access based on job roles, teams, or individual users. That means your HR folder stays private, while shared resources remain open to the whole team. You're always in control of who has access to what – and you can update permissions instantly if someone changes roles or leaves the company.

Built-in protection from accidents

We've all had that moment: someone deletes the wrong file or overwrites important information. SharePoint includes version history and easy restores, so those "oops" moments don't turn into big problems. You can always recover the correct version with just a few clicks.

Security that constantly works behind the scenes

SharePoint is backed by Microsoft's enterprise-grade security – encryption, threat monitoring, and regular updates to shield you from the latest risks. It automatically applies strong safeguards without requiring you to manage complex security tasks yourself.

Compliance support where it matters

If your business needs to maintain compliance – whether industry standards or internal policies – SharePoint supports that through data governance features like retention rules, auditing, and sensitivity labels to prevent oversharing.

Share safely inside and outside your business

When you need to share files with a partner, client, or contractor, you can do it securely and selectively. SharePoint lets you grant access only to what's necessary and remove it the moment the work is done.

SharePoint gives your team the freedom to work confidently, knowing your data is protected, organized, and under your control at every step – without adding extra stress or complexity.

Avoid these common SharePoint traps

SharePoint offers a lot of powerful features, but like any business tool, the results depend on how you set it up and use it. Here are some common mistakes organizations make when they first get started – and how you can avoid them.

Dumping everything into one giant library

If your team uploads every document they have without a plan, things can get messy fast. Instead, create a clear structure from day one – organized by department, program, client, or however your business actually works. When the layout makes sense, people adopt the platform more easily.

Allowing everyone to see everything

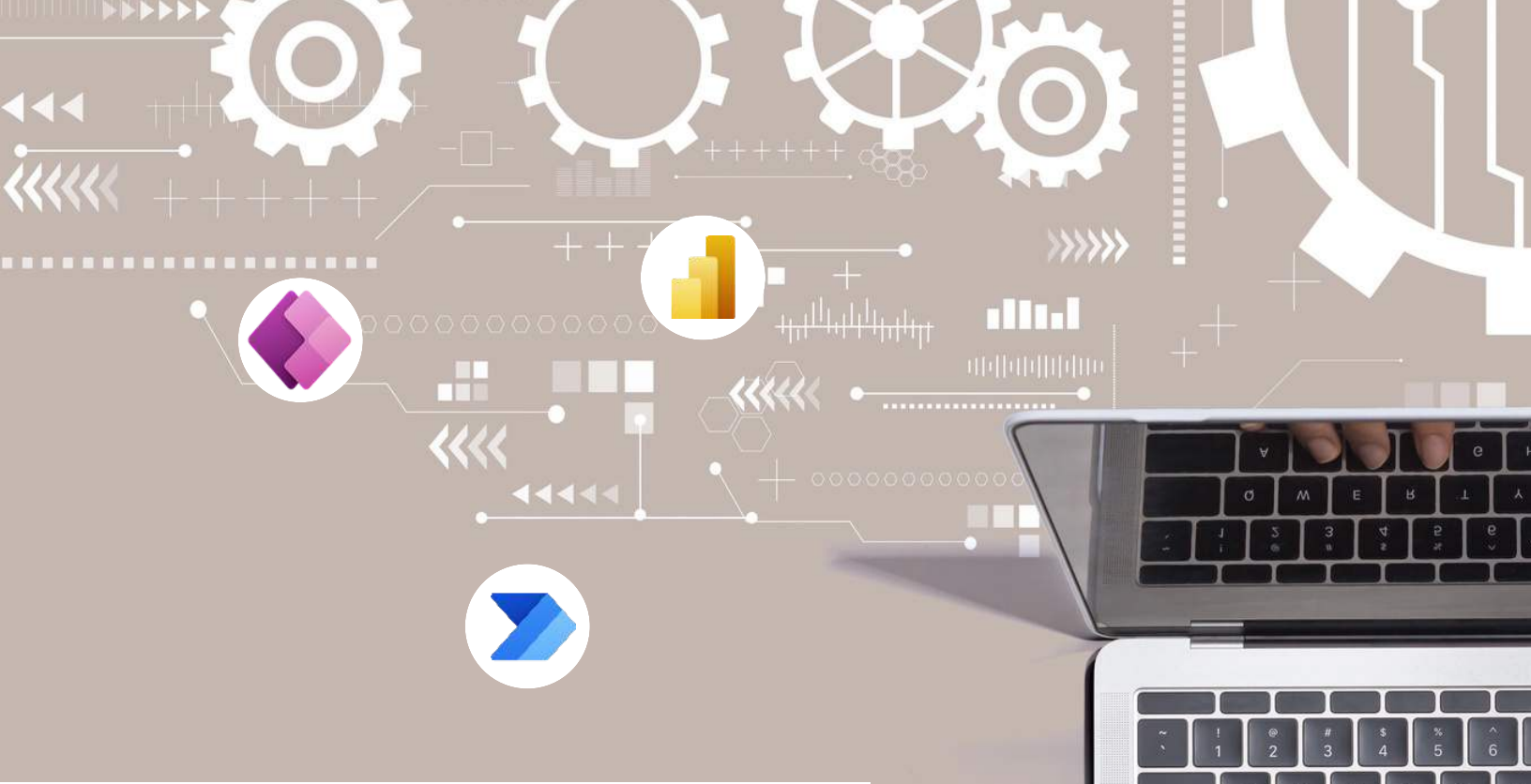
It may seem faster to give broad access to all content, but that can create confusion and risk. Assign permissions intentionally so people only see what they need to do their jobs. This keeps sensitive information protected while still empowering teams to work efficiently.

Skipping onboarding and training

SharePoint can feel unfamiliar to those used to shared drives or desktop folders. A little upfront training goes a long way. When employees understand how SharePoint makes their work easier, they'll use it consistently – and you'll avoid people reverting back to old habits.

Trying to activate every feature at once

Yes, SharePoint does a lot – but you don't have to use everything right away. Start with the basics: document libraries, simple pages, and access controls. Once those are working smoothly, you can introduce more advanced tools like automated workflows and business apps.



Beyond basics: **Automate & integrate**

Once your team is comfortable storing and collaborating on files in SharePoint, that's when the real magic begins.

SharePoint connects with other Microsoft tools to unlock automation and streamlined workflows that save time and reduce manual effort across your business.

Power Automate

You can create automated workflows that handle repetitive tasks so your team doesn't have to. For example, you could automatically route a document for approval, notify a manager when a project task is complete, or send reminders when a policy review is due. These small automations keep important work moving without someone chasing down next steps.

Power Apps

Not every business needs custom software, but many could benefit from simple apps that solve everyday challenges. Power Apps lets you build tailored tools – like request forms, inventory check-in pages, or client checklists – without any coding. These apps connect directly to SharePoint lists and libraries, ensuring data stays organized and easy to track.



Power BI

Every business generates data, but not every business takes advantage of it. Power BI allows you to visualize key performance metrics, program activity, sales trends, or operational results in easy-to-read dashboards and charts. Because Power BI can pull information straight from SharePoint, your reports always reflect the latest data.

Smarter workflows without extra cost

The best part? Many Microsoft 365 subscriptions already include access to these tools. You're likely already paying for capabilities that can help modernize how your entire organization works – without adding new software or major expenses.

A foundation that grows with you

As your business evolves, SharePoint evolves with it. You can start small and add automations and integrations over time, improving efficiency in areas where your team needs it most. It's not about doing everything at once – it's about making continuous improvements that deliver noticeable benefits.

With the right setup, SharePoint becomes more than a place to store files – it becomes the engine behind smooth workflows, faster collaboration, and smarter decisions. you just haven't unlocked their full value yet.

SharePoint can help your business stay organized, work more efficiently, and keep important information secure. Whether you want to start small with one team or roll out a full company-wide solution, the key is having the right setup and guidance from the start.

If you're ready to improve the way your people store, share, and collaborate on information, we're here to help. We'll work with you to plan, build, and support a solution that fits your goals and budget – without disrupting your day-to-day operations.

Want to see how SharePoint could streamline your business?

Let's talk

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