



Education Services Firm Drives Adoption Of SharePoint for Email Management

The Learning Trust

“Colligo Contributor Add-In is so simple to use that it is driving adoption of SharePoint. It improves access by making SharePoint libraries and lists available in an Outlook folder tree. More importantly, users can easily drag-and-drop emails to document libraries, improving centralization and management of content, while enhancing collaboration across departments.”

Geoff Carter

Head of ICT Business

IT Services

The Learning Trust



the learning trust
the future for education in Hackney

The Learning Trust is a not-for-profit company that runs all the education services for the London Borough of Hackney, a geographical area comprised of 220,000 people. They deployed Microsoft® Office SharePoint® Server 2007 (MOSS 2007) to improve organizational effectiveness by providing comprehensive content management and to facilitate information sharing cross-departmentally for better business insight. Their vision was to connect staff with the information and expertise they needed, when they needed it, to be able to do their jobs more effectively. Today, The Learning Trust manages multiple SharePoint sites, many of which are project-specific. By selecting Colligo Contributor™ Add-In for Outlook®, emails and attachments can be easily moved or copied from Microsoft® Office Outlook®, to SharePoint libraries and folders through drag-and-drop, improving professional productivity.

About The Learning Trust

The Learning Trust employs approximately 750 staff members who deliver educational services to adult learners and over 27,000 pupils in more than 70 schools, nurseries, and playcentres in the London Borough of Hackney. It is the United Kingdom's first private, and importantly, not-for-profit company responsible for running all education services for an entire borough. The Learning Trust is dedicated to recruiting and retaining quality staff and increasing capital investment in education to benefit schools, adult learners, and the wider community. The Learning Trust aims to provide students with the best possible educational opportunities, cutting edge facilities, and resources.

Application

Professional staff at The Learning Trust use the Colligo Contributor Add-In for Outlook to improve access to SharePoint and to support email and attachment management in SharePoint.

Business Challenge

At The Learning Trust, the IT Services department is positioned as an internal services business. “We see our business as facilitating the overall business plan. Our goal is to make work easier, without creating a technical experience,” said Geoff Carter, Head of ICT Business, IT Services. “We work to help people stay abreast of business activities and projects by making information more accessible.”

In order to improve collaboration and centralize information, The Learning Trust decided to deploy MOSS 2007. It selected SharePoint as an all-inclusive solution, to provide secure internet and delivery systems. It first launched an intranet site, where information could be securely shared with schools and other agencies, such as with Health Services and Social Services, and where projects could be managed. The Learning Trust also launched a website to raise awareness about the services they provide to external customers.

“Previously, we relied on public folders and file shares. As a result, staff stored documents on personal drives and within their inbox ... or they would move files into public folders or file shares specific to their departments,” commented Carter. “We are in a service-oriented business. This means professionals in various departments are often involved on the same projects and require full access to information to discuss cases intelligently with schools. Prior to SharePoint, it was very time consuming for staff to go through files and print off required documents before visiting facilities. With



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SharePoint, we have been able to eliminate silos, providing easy access to the information ... it's about thinking globally and collaboratively."

In addition to managing documents in SharePoint, The Learning Trust needed a means to manage emails in SharePoint. "Fifty to 60 percent of communication takes place by email in our organization. To better manage projects and to eliminate department silos created by public folders, we wanted to centralize all content, including email," said Carter. "For example, the IT Services department needed a way to be able to track emails regarding the resolution of issues. In the legal department, there are many professionals working together on the same case, which is why it is crucial that all information is available centrally." The Learning Trust wanted an easy way for staff to drag-and-drop emails into SharePoint to improve enterprise content management and accelerate adoption of SharePoint.

Solution: Colligo Contributor Add-In for Outlook

Colligo for SharePoint partner Content and Code, a leading provider of information management solutions in the United Kingdom, introduced Colligo Contributor Add-In for Outlook® to The Learning Trust. After conducting a trial, The Learning Trust selected Contributor for deployment to their staff. Contributor Add-In increases user adoption of SharePoint for email and attachment management. It provides full read and write access to SharePoint document libraries and lists within the Outlook interface. Users are able to easily move or copy emails and attachments to document libraries with a simple drag-and-drop, while automatically capturing message fields (like To, From, Subject, and Date). Custom metadata can be instantly applied at the time of drag-and-drop or automatically set at the folder-level.

"In a nutshell, the biggest advantage of deploying Colligo Contributor is that it is super simple to use. It makes life easier for staff, because it fits into the way they are already working," said Carter. "Users like the easy drag-and-drop experience. It's so intuitive that we've not had to explain the technology behind it. People are collaborating in new ways, and many don't even realize they are using SharePoint since they are accessing it within Outlook folders. The most substantial benefit is that there is no longer segregation between documents and emails. People can now investigate situations and locate information themselves rather than repeatedly asking each other for the same information."

The IT Services department has discovered another great use of the drag-and-drop functionality that Colligo Contributor provides. "Staff will often receive compliments by email on a job well done. All congratulatory email messages are dragged and dropped into a common folder in SharePoint," said Carter. "This has become our 'Star Area' to share our success stories. It is motivating everyone to provide a higher level of customer service."

The Learning Trust has seen a considerable return on investment from Colligo Contributor Add-In for Outlook®. In addition to creating a more efficient workplace, they have noted a more collaborative workplace. "The productivity gains speak for themselves," noted Carter. "We have also improved perceptions regarding the delivery of our services to the schools and local community, while improving internal collaboration across departments."

Results

By deploying SharePoint and Colligo Contributor Add-In for Outlook, The Learning Trust has been able to:

- Increase SharePoint adoption by simplifying access within Outlook
- Deliver an easy drag-and-drop experience to make work easier
- Enable and streamline email and attachment management in SharePoint
- Reduce departmental silos resulting from the use of public folders
- Increase productivity and collaboration with centralized information across departments
- Improve customer service excellence with centralized access to information



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