



CASE STUDY:

Towers Watson Improves Regulatory Compliance with Colligo-Powered Email Records Management.

INDUSTRY: Professional Services
APPLICATION: Email Records Management

TOWERS WATSON 

Introduction

Towers Watson is a trusted business partner on people and financial issues to the world's leading organizations. The firm's global services include managing employee benefit programs, providing strategic advice to financial services companies, and delivering related technology and data services. Towers Watson has 7,700 associates in 105 offices, located in 33 countries worldwide.

“Colligo allows associates to easily access SharePoint content from within Outlook while supporting drag-and-drop actions for email management.”
- Nishan DeSilva, Records and Content Management

Business Challenge

As a professional services firm with clients around the world, Towers Watson is in the business of managing information. “We needed a better way to protect client documents and wanted to ensure that we had a consistent way of managing client information inside the organization,” said Nishan DeSilva, Global Director, Records and Content Management, Towers Watson.

The firm aimed to make user experience easier while continuing to support regulatory compliance. To comply with regulatory requirements, associates at the firm needed to be able to select, save, and retain pertinent client emails and all client documentation. Furthermore, the firm wanted to invoke a consistent and simple taxonomy for both emails and documents to improve the structure and retrieval of business data, while supporting compliance.

To guarantee ease-of-use, Towers Watson wanted to support dragging and dropping important emails and documents from multiple locations, including Outlook, public folders, network drives, and desktops. Finally, with over 7,700 staff worldwide working from multiple locations, including client offices, the solution required extensive offline capabilities to assist traveling associates in managing client information.

Solution

Prior to deploying SharePoint, the firm identified several critical success factors, including regulatory compliance, offline access, and easy adoption. By supporting all of these requirements, Colligo became a critical component of the firm's complete enterprise records management solution. Towers Watson selected the Colligo Outlook app to improve email and document management at the firm.

Colligo provides Towers Watson associates with the ability to use the Outlook interface to access RecordsExcellence, along with standard drag-and-drop capability for email management. It delivers an intuitive way to upload content to SharePoint and to browse document libraries and lists, all from within Outlook. Users can also drag-and-drop emails while offline, with the changes automatically synched the next time they are online.

To structure data, a SharePoint site was created for each Towers Watson client, including both a document and email library. The email library design includes an “Outlook View” that provides associates with a seamless experience between RecordsExcellence and Outlook. “By mapping

SharePoint email libraries to Outlook folders, Colligo allows associates to easily access SharePoint content from within Outlook while supporting quick drag-and-drop actions for email management,” said DeSilva.

Colligo has improved enterprise records management at Towers Watson by supporting a number of additional functional requirements. “Associates can drag-and-drop multiple documents at the same time, while applying common tags. They can add emails with attachments or simply add the attachments. Another interesting feature we like is the ability to drag-and-drop documents from network drives to SharePoint, so that business information can be moved from legacy drives to RecordsExcellence by the associates themselves,” explained DeSilva.

Travelling associates at Towers Watson use Colligo for offline access to SharePoint libraries and lists, including metadata, with full two-way synchronization. Colligo allows associates to easily move email attachments to SharePoint, replacing them with links.

Results

Deploying Colligo has enabled Towers Watson to:

- Drive implementation of a global records management strategy through ease-of-use
- Streamline the processes of adding client and business information to SharePoint
- Provide seamless access to SharePoint content offline
- Reduce risk and liability by improving regulatory compliance
- Improve efficiency through the effective structure and retrieval of business data

About Colligo

Colligo enables workers to have easy, anytime access to content stored on enterprise information systems such as SharePoint/Office 365, regardless of device or connectivity. The company’s award-winning collaboration and data sync technology is used by over 5,000 global organizations to increase worker productivity, streamline collaboration and reduce IT risk. Colligo counts many high-profile organizations amongst its customers, including Microsoft, Exxon, Siemens, Towers Watson, Shell, Bayer and the US Department of Energy.

For more information:

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