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# Compliance Agency Achieves Massive Time Savings & M365 Adoption

Agency staff were spending a tremendous amount of time filing emails and attachments to SharePoint and emailing content from SharePoint. The multi-step, time-consuming processes involved many staff members and, at times, could take up to three days.

After accelerating its move to the cloud due to the pandemic, the Agency selected Colligo Email Manager for Microsoft 365, an easy-to-use add-in that allows staff to upload emails and attachments from Outlook to SharePoint Online, while remaining in Outlook, and quickly email content from SharePoint.

As a result, staff can now file emails to SharePoint – with auto-applied metadata – in seconds instead of days. They no longer need to forward documents for uploading, expediting the completion of tasks, with fewer hands touching emails. With the ability to email direct from SharePoint, content duplication has decreased dramatically. The solution's benefits have increased staff's willingness to embrace the change to SharePoint Online.



## AT A GLANCE

Customer: Co-operative non-profit  
compliance monitoring agency

Website: <https://www.colligo.com>

Customer Size: Medium (50 - 999  
employees)

Country: Canada

Industry: Nonprofits

Products and Services: Microsoft 365,  
SharePoint Online, Outlook, Azure,  
Colligo Email Manager for M365



# Colligo, Compliance Agency & Microsoft 365, SharePoint, Outlook & Azure

## Customer Challenges

The Agency was using SharePoint 2016 to file important emails and documents, but getting the content into SharePoint was a laborious, time-consuming process. Filing an email or attachment to SharePoint, or emailing content from SharePoint, could take days and might involve a four-step process with multiple team members. Given the number of documents each client is required to upload, this amounted to 20-30 days per year.

To avoid the hassle and time involved, staff developed workarounds and shortcuts including keeping copies of documents on their desktops or in shared drives. Versioning issues and duplication of content were rampant.

## Partner Solution

Due to the pandemic and the switch to remote work, the Agency fast-tracked a move to SharePoint Online. Management selected Colligo Email Manager for Microsoft 365 to save emails and attachments directly to SharePoint with auto-applied metadata - without leaving Outlook. Staff can also email SharePoint content as links for easy collaboration and file-sharing with their teams or external contacts.

After evaluating several solutions, the Agency determined that Colligo Email Manager more than met its needs, as this was an easy-to-use add-in designed as a front-end to SharePoint. The Agency was impressed with Colligo's SharePoint expertise, support-team availability and Canadian roots.

## Customer Benefits

**Instead of taking multiple days to file emails to or send content from SharePoint, Agency staff can now file and send emails within seconds, without any administrative involvement - a time savings of close to 75% - increasing worker productivity.** As the Agency's Specialist, Information Technology states, "With Colligo, I get emails to SharePoint a lot faster than I ever did before because it's so simple and easy and doesn't require any training."

SharePoint adoption has also risen dramatically, and staff no longer need to rely on administrative staff to upload their documents. Documents that were being stored in email exchanges are now making their way into SharePoint, increasing compliance with Agency rules for document governance. Collaboration has greatly improved, as content can be easily accessed from anywhere.

### Significant time savings

From a few days to a few seconds, filing email to SharePoint is quick and easy, with no training required.

### Improved collaboration

Email and attachments are stored and tagged in SharePoint instead of siloed in shared drives and desktops.

### Increased user adoption

Staff remain in Outlook but file to SharePoint, with no need for workarounds and shortcuts.