

Ovivo Uses Colligo Email Manager to Capture Multimillion-Dollar Knowledge to Profitably Manage Projects



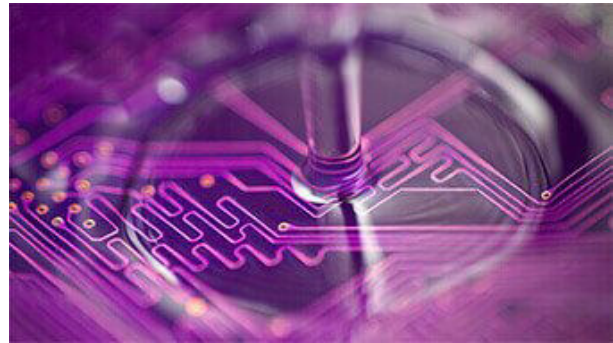
INDUSTRY: Water Treatment
USE CASE: Manufacturing and Engineering

Introduction

For any business running multimillion-dollar global projects, profitability depends on having mastery of project knowledge, including the thousands of legacy discussions and decisions related to estimating, managing, billing and executing projects in a way that can be legally defended to the letter of the contract.

Ovivo is a world expert in water treatment technology with over 35 years' experience in municipal water management, industrial wastewater processing and water filtration and cooling for electronics. Ovivo's water treatment business is based on executing large-scale global projects, some spanning more than five years, and involving teams distributed across North America, Europe and internationally working with partners and contractors as distributed teams.

Over the lifecycle of every project, thousands of documents and many more emails are produced containing critical information for project decisions, billing and defending contracts. Historically, this emailed knowledge was saved only to individual personal drives, with many employees and contractors then coming and going over a project's lifespan. With so many moving parts and so much at stake, Ovivo recognized the



need to make critical project information held in email easy to save, search for and share across evolving project teams.

Ovivo recently put Microsoft SharePoint in place as a foundation for centralized knowledge management. While SharePoint is in place, employees spend most of their time in Outlook and the old habit of saving emails and attached critical information to personal Outlook folders was inhibiting preserving project knowledge, accurately estimating future projects, recovering costs, and legally proving contract obligations were met long after a project was completed.

SUMMARY

CHALLENGE

- Storing email in Outlook PST files was inefficient for cross-team access to information for project planning, budgeting and management.
- Knowledge transfer was at risk as project teams shifted.
- Legal discovery was time consuming and error-prone.

SOLUTION

- Enabled much faster search and sharing of complete project information by email and attachments in SharePoint, logically classified and with useful metadata.
- Simplified information capture by integrating SharePoint folder access directly into Outlook.

RESULTS

- Complete project knowledge supports full project cost recoveries and more profitable project estimating and management.
- Timely, economical legal discovery saving tens of thousands of dollars per year.
- Company project knowledge protected as employees shift roles or depart.

Challenge

The only department using SharePoint for email management prior to implementing Colligo was Ovivo's legal team. For the rest of the company, using SharePoint to save emails related to projects was considered too time consuming and so, teams used a mixture of public folders in Outlook and folders in the company's C drive to store archived emails.

Ovivo recognized the importance of coming up with a solution that was simple for employees, and there was urgency to evolve from saving emails randomly in local folders for a number of reasons:

Knowledge transfer was at risk as project teams shifted. Ovivo projects commonly last five years or longer. Over that period, project teams often expand and change. With each departing member, Ovivo must mine through the siloed project emails on the individuals' local drive, spending hours mining for critical project knowledge, knowing there is risk that valuable items will be overlooked.

Incomplete project information was being stored in a scattered way. With the majority of teams and proj-



ects using traditional folders, emails and attachments became increasingly difficult to find. As time passed and thousands of emails accumulated, searching shared folders became increasingly difficult.

Emails not classified or tagged for later lookup. By maintaining emails in PST files, without any method of classification meaningful across the team, searching for project details was time consuming, and often critical data could not be found sometimes inhibiting planning, estimating and billing. No additional meta-data was captured to facilitated later search.

Legal discovery was time consuming and error-prone. In the event of a lawsuit or arbitration, Ovivo would need to copy the archived PST files from a legacy employee onto an external drive, connect the drive to the Outlook account of an existing user, let the files index for several days, and then query from a single computer to save emails in folders associated with each claim topic, manually changing the file name to something more relevant. This process could cost hundreds of thousands of dollars in contractor fees and employee hours.

"People were used to creating Outlook folders, and then creating more folders within them, down and down. When you are getting thousands of emails, this gets even more complex. We needed an easy way to transfer emails and attachments to SharePoint that integrated with Outlook, Windows and Explorer."

Michel Guenette, Vice President, Information Technologies, Ovivo

Solution

Ovivo relies on SharePoint for knowledge and records management, but needed to streamline access to simplify capture of complete project information. Employees were used to working from Outlook, they needed a way to continue to work productively from their inbox. In 2017, Ovivo's incoming Vice President of Major Projects recommended Colligo as the best solution for SharePoint adoption. He had used the Email Manager add on before in a previous role.

With Colligo chosen, implementation and training were then led by project teams. Each department creates simple on and offline libraries in SharePoint structured to logically, consistently store critical information and Colligo makes doing so easy from Outlook. Employee champions then share how it works with others, and the ease of use is bringing project teams deeper into SharePoint.

Simplified project knowledge capture. By integrating SharePoint folder access directly into Outlook using Colligo Email Manager, employees are able to save emails and attachments directly to SharePoint

from their Outlook inboxes. In just a couple of clicks, employees save a project-related emails and attachments to the relevant library in SharePoint, with Colligo automatically storing key fields like subject, sender and date as metadata.

Faster search and sharing capabilities. Anyone on a project team can now rapidly search for, find and share secure links to valuable emails and attachments as they are captured and tagged with useful metadata. The time savings and complete information access informs profitable project management, and ensures everyone is working from complete and current information.

Mobile and offline access to email records. Even Ovivo employees working in locations with low bandwidth use Colligo Email Manager to save and classify emails to offline SharePoint libraries. Colligo's complete platform means that Ovivo's employee can access SharePoint from Outlook on premise, on mobile devices and in via Office 365 if Ovivo shifts there in future.

"From my point of view, Colligo simply makes SharePoint transparent to the user. The user can keep spending all their time in Outlook, feeding the SharePoint libraries and adding metadata without any effort. I don't think you can properly use SharePoint without connecting it to Outlook."

Jean-Francois Thibault,
P.Eng., Vice President, Major
Projects, Ovivo



Results

Colligo has now been in use for over a year on most of Ovivo's larger projects to save emails, attachments and documents to SharePoint. Achieving a full transition to SharePoint across the entire company is still a few years off, but already Ovivo has seen valuable impact including recouping hundreds of thousands in costs on a delayed project, saving thousands on legal discovery, and shifting team behaviour towards routinely capturing and protecting project knowledge.

Full project cost recoveries. Ovivo was experiencing significant delays with a \$200-million project in South Africa. They were operating on a cost-plus basis, substantiating all costs related to the project. With Colligo making it faster and simpler to save to SharePoint, teams accurately documented and defend project costs and as a result, Ovivo been able to get close to \$1 million reimbursed for maintenance costs. They are using the same emails and documents saved to SharePoint via Colligo to substantiate an additional \$1.5 million claim.

Timely, economical legal discovery. On a legal arbitration case in Ontario, prior to the SharePoint era, Ovivo spent \$300,000 on consultants, on top of months of employee time to retrieve documents manually. By comparison, Ovivo has since used Colligo in two major construction arbitrations, to migrate the complete mailboxes of former managers into separated libraries.

"Without Colligo it is unlikely we would have had the effective and complete data capture we needed to substantiate these claims. We would not have been able to make the data-driven case for cost recovery."

Jean-Francois Thibeault, P.Eng. Vice President, Major Projects, Ovivo

"The two are inseparable in employees' minds and the support Ovivo has received from Colligo has enabled us to learn as we go, evolving Colligo's functionality to fit the needs of individual teams to create flexible systems that work for the project team, not Ovivo's IT department."

Michel Guenette, Vice President, Information Technologies, Ovivo

The email libraries in SharePoint were connected to a claim topics list with a reverse lookup. The search could be done very easily in SharePoint, using the built-in viewer to identify the relevant documents and associate them with the right topics. The ability to annotate, comment and tag files enabled the creation of easily searchable document lists. Multiple people could work on these projects at once and they were able to give SharePoint access to external consultants.

Complete project knowledge capture. Ovivo's Vice President of IT believes Colligo has been the key to achieving employee SharePoint adoption. Colligo has helped employees to break old habits and make saving emails to SharePoint from their inboxes second nature, thereby creating complete and enduring multi-million-dollar project knowledge for Ovivo.

\$1 million

reimbursed for maintenance costs

\$1.5 million

substantiated as an additional claim



Colligo supports intelligent knowledge management and compliance on SharePoint and Office 365 – all designed for your users. Our complete email and document management solution helps organizations with diverse Microsoft environments to improve productivity and make data compliance practical. Colligo is a Microsoft Silver Application Development Partner and is proud to serve mid-sized organizations, Global 500 customers, and respected SharePoint and records management partners. www.colligo.com





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www.colligo.com

 @colligo

 info@colligo.com

 +1.866.685.7962

 +44.203.667.36558