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Leading Canadian Law Firm Cuts Email Filing Time by 10–15x With Colligo

An award-winning Canadian legal firm handles high-stakes commercial, regulatory, public law, and white-collar matters. The firm emphasizes efficiency, responsiveness, and technology that helps its lawyers deliver strong client-focused results.

The firm modernized its legal email

management by moving from iManage to a Microsoft 365 and SharePoint-based environment supported by Colligo. With email filing available directly in Outlook, the firm simplified matter-based filing, reduced repetitive administrative work, and improved adoption of SharePoint for everyday matter management.

At a glance



Customer: Leading, award-winning law firm

Customer size: 25 users

Country: Canada

Industry: Legal Services



Colligo

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The challenge: Modernizing email management without disrupting legal workflows

As part of its broader modernization efforts, the firm transitioned away from its legacy document and email management platform, iManage, and moved to a Microsoft 365 and SharePoint-based environment. While SharePoint provided a strong foundation for document management and collaboration, the firm needed a solution that would allow its lawyers and staff to efficiently file and retrieve emails directly from Outlook in a manner that aligned with their existing workflows.

The firm's goals were to:

- Maintain a structured and organized approach to email filing.
- Improve user adoption of SharePoint for matter management.
- Reduce the administrative burden associated with saving and organizing emails.
- Ensure seamless integration with the Microsoft tools the team uses every day.
- Provide a familiar and intuitive experience for lawyers accustomed to traditional document management systems.

- ✓ **Time savings** through simplified email filing and retrieval.
- ✓ **Improved accessibility and organization** of client communications across the firm.
- ✓ **Greater user adoption** of SharePoint and Microsoft 365-based matter management.



Colligo has significantly streamlined how our team manages email filing. Being able to file directly within Outlook—especially through save-on-send and auto-filing folders—has reduced the number of clicks required and made the process far more efficient for our associates and staff.

IT Services & Operations Manager
Leading Canadian Law Firm



The solution: Matter-based email filing directly from Outlook

Connecting Outlook to SharePoint matter workspaces

To support the transition, the firm needed an email management experience that combined the structure of a legal document management system with the familiarity of Microsoft Outlook. Colligo provided that bridge by connecting Outlook activity to SharePoint-based matter workspaces.

Reducing clicks in everyday email filing

A primary objective was reducing the time lawyers and associates spent on email filing. In a litigation practice handling high volumes of matter-related communications, fewer clicks can quickly translate into meaningful time savings.

Colligo addressed this need by integrating directly into Outlook, enabling users to file emails without switching applications or interrupting their workflow. Because the filing experience lived inside the Microsoft tools the team already used every day, adoption was straightforward and the process felt familiar.

Several features have been particularly valuable. The Save on Send functionality allows users to send and file an email simultaneously with a single action, eliminating an additional filing step.

Automating filing with linked Outlook folders

Even more impactful has been the ability to link Outlook folders to specific SharePoint matter workspaces. Associates can simply drag and drop emails into the appropriate Outlook folder, and those emails are automatically filed to the corresponding matter in SharePoint without requiring any additional clicks. This automation significantly reduces the administrative burden associated with email



management while ensuring communications are consistently stored in the correct location. By streamlining filing workflows and reducing manual effort, Colligo has helped the firm's lawyers spend less time managing emails and more time focusing on client work.

The IT Services & Operations Manager states, "Colligo has significantly streamlined how our team manages email filing. Being able to file directly within Outlook—especially through save-on-send and auto-filing folders—has reduced the number of clicks required and made the process far more efficient for our associates and staff."

Supporting a familiar transition from iManage



An important factor in the success of the implementation was that many of the workflows mirrored processes the firm's lawyers were already familiar with from iManage. As a result, users found the transition intuitive and adoption was smoother than expected.

As the implementation progressed, the Colligo team worked closely with the customer team to address questions, investigate issues quickly, and provide responsive support throughout the rollout.

"The transition to Colligo was intuitive because it closely mirrored workflows we were already familiar with from iManage...the Colligo team has been highly responsive and proactive in resolving issues, and we've appreciated the ongoing rollout of enhancements that continue to improve the user experience," adds the IT Services & Operations Manager.

The firm has also appreciated Colligo's commitment to continuous improvement. The team regularly introduces new features and enhancements that help further streamline workflows. Features such as Quick Filing suggestions and Metadata Enrichment have been well received by users and demonstrate Colligo's ongoing investment in improving the product experience.

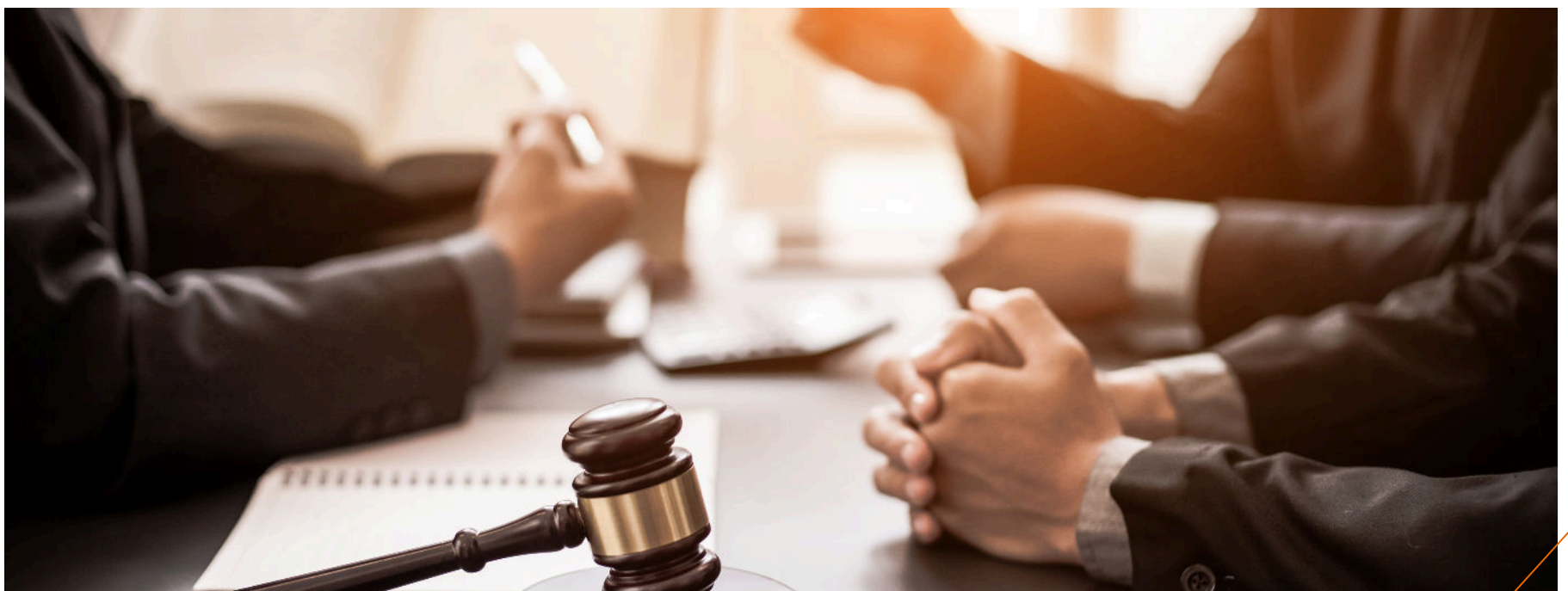
The results: Faster filing, stronger adoption, and better matter organization

Since implementing Colligo, the firm has successfully transitioned its email management processes into its Microsoft 365 and SharePoint environment while maintaining the organizational structure its lawyers rely upon. The solution has helped improve user adoption, reduce administrative effort, and support a more unified approach to matter management.

One of the most significant benefits has been the reduction in time spent filing emails. Traditional email filing typically requires several clicks and can take approximately 10–15 seconds per message. With Colligo's Outlook folder auto-filing functionality, users can simply drag an email into a matter-specific Outlook folder and have it automatically filed to the corresponding SharePoint workspace in just a second or two.

- 10–15x** Reduction in email filing time
- 25,000+** Emails filed each month
- Fewer** Manual steps with Outlook-to-SharePoint filing

This represents a 10-15x reduction in time per email filed. While the time savings on a single email may seem small, they add up quickly in a litigation practice where lawyers and associates routinely process hundreds of emails each day.





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IT Services & Operations Manager, Leading Canadian Law Firm



The legal team is now filing over 25,000 emails each month with Colligo. By reducing the number of clicks and eliminating repetitive filing steps, Colligo has helped the firm’s professionals spend less time on administrative tasks and more time focused on client service and billable work.

Colligo has also provided a more cost-effective solution compared to the firm’s previous iManage environment, while continuing to meet the firm’s requirements for structured email and matter management within Outlook and SharePoint.

The firm can now provide a seamless experience for filing emails directly into SharePoint-based matter workspaces without requiring users to leave Outlook or adopt cumbersome manual processes. This has enabled the firm to fully leverage its Microsoft 365 investment while maintaining strong document and email governance.

Key Outcomes

- ✓ **Time savings** through simplified email filing and retrieval.
- ✓ **Greater user adoption** of SharePoint and Microsoft 365-based matter management.
- ✓ **Improved accessibility and organization** of client communications across the firm.

