

repstor 

# 10

important benefits  
from standardising  
on Office 365 for  
case management



Across functions as diverse as HR, procurement, IT, asset management, customer care and logistics, O365 is already a common denominator for case workers and managers - so what better basis for these functions to improve content management, process consistency and collaboration? It also comes with a wealth of rich functionality and application integration that would cost a premium with dedicated content management systems.

Here's how the case for O365 stacks up

## 1 A chance to increase the payback from existing cloud and software investments

The de facto corporate productivity suite, Office 365 is now so integral to everyday business activity that it is the obvious platform for document and case management. In a digital-first, cloud-enabled world, where fast and flexible collaboration is expected, it no longer makes sense for business functions to invest in separate, specialist systems - and create new content silos - to manage case files and correspondence. Not when rich existing functionality is already at everyone's fingertips.

With a few key enhancements to bring consistency and simplicity to how content is filed and found, it's a logical progression to make O365 the basis for organising, sharing and tracking case-related documents and emails. Whether the case-handling teams are in HR, procurement, IT, asset management, legal services, risk management, customer care, supply chain logistics or other departments/functions, they can continue to work the way they always have - using software they know. Just with greater control and consistency over how case content is stored, managed and accessed.

In addition to improved productivity, O365-based case management drives up process accuracy and transparency - without users needing special training or to change the way they work. For IT decision-makers, it's a chance to drive more value from existing investments as, in O365, these teams already have up to 90 per cent of what they need in their current systems. All they need to do is unlock the potential.

## 2 The comfort of future-proofing

Where specialist content management systems can be expensive to maintain, and risk becoming unsupported over time, Microsoft's commitment to Office 365 is substantial – and growing. The modern, cloud-hosted version of its popular office productivity suite is closely aligned to Azure, Microsoft's strategically important cloud infrastructure platform. So if anything new and exciting is going to come along this is where it will happen – because this is where Microsoft is directing the bulk of its investment. This is reflected in its financial results: in the first quarter of 2018, Microsoft's commercial cloud activities – including the commercial edition of Office 365, the Azure cloud computing platform and the Dynamics 365 enterprise planning and customer relationship platform – recorded growth of 56%, translating to £14.36 billion (\$20.4) billion in annual sales<sup>1</sup>.

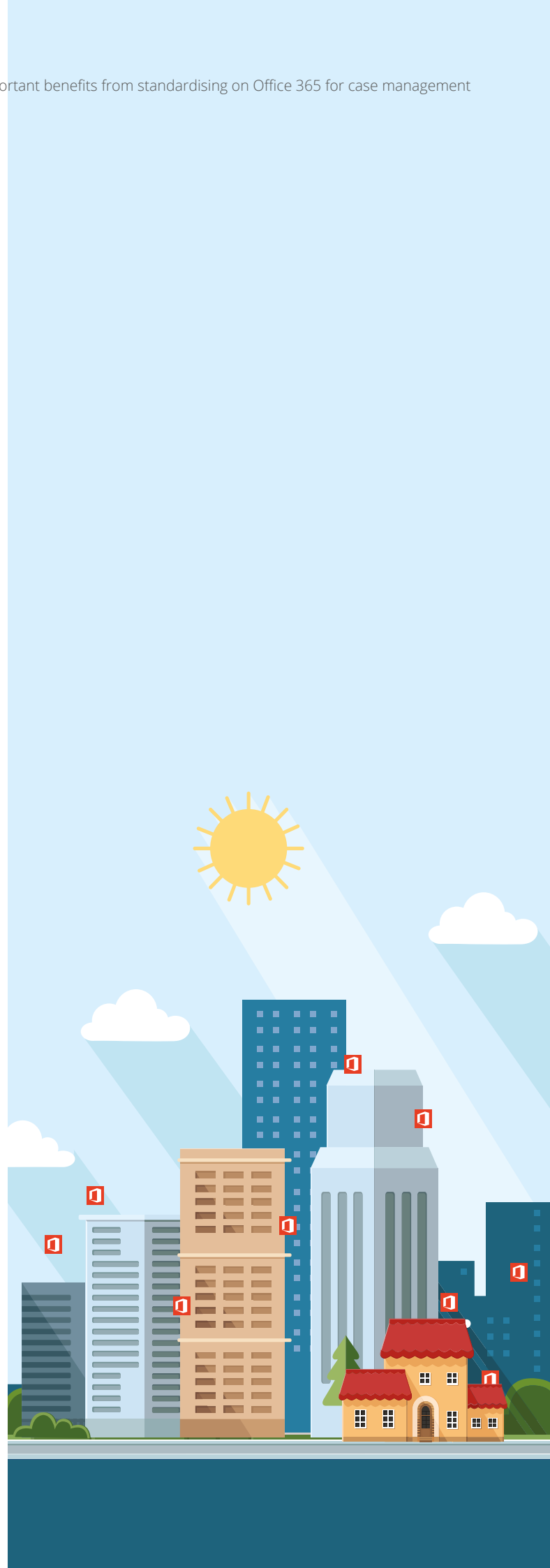
## 3 The convenience of being in sync with the wider world

Office 365's user numbers are soaring, so using the platform to manage case files and correspondence offers to improve collaboration both internally and externally. O365 features including Teams, Groups and the ability to build client or case specific extranets offer an attractive range of options for collaboration. Organisations can embrace this potential confidently too, safe in the knowledge that platform security levels are high (see 8) – because this is another major area of continuous investment from Microsoft<sup>2</sup>.

According to the latest statistics from Microsoft, issued in late 2017, 120 million business people use Office 365 now, so organisations that standardise on the platform for more of what they do every day will find themselves in good company.

<sup>1</sup>Microsoft's Cloud Transformation Is Blowing Minds, The Street, October 2017

<sup>2</sup>Office 365 security, Microsoft.com



## 4 Automatic access to the hottest new functionality – including AI

Already a richly-featured productivity and content management platform, Office 365 is being added to all the time – by Microsoft itself and by its vast global ecosystem of software partners. At the last count, Microsoft estimated it had 64,000 partners working in cloud services<sup>3</sup>, all adding new value, features and functionality to its major platforms.

Already, rich value-added capabilities such as workflow, task management, clever analytics and flexible reporting are available on tap, along with next-generation capabilities which harness AI and machine learning to accelerate the way users do things, for example via intelligent search<sup>4</sup>.

And because O365 is cloud-based, users typically don't have to wait to benefit from the latest functionality, or pay a premium for the privilege.

### Popular O365 features currently include<sup>5</sup>:

- **Microsoft Bookings** - an online and mobile app for small businesses providing services to customers on an appointment basis.
- **Microsoft Flow** – designed to automate workflow across applications.
- **Microsoft Forms** – for creating surveys, registrations and more.
- **Microsoft MyAnalytics** – a personal analytics tool measuring and helping get the most of people's time at work.
- **Microsoft Planner** - a visual way to organise teamwork.
- **Microsoft PowerApps** – the ability to build, integrate and share apps that work on any device.
- **Microsoft StaffHub** - a cloud-based application that lets people and their managers use their mobile devices to manage schedules and keep in touch.
- **Microsoft Stream** - an enterprise video service for uploading, viewing and sharing company videos securely.
- **Microsoft Sway** - a professional digital storytelling app for business using an interactive, web-based canvas.
- **Microsoft Teams** - a hub for teamwork, providing instant access to chat conversations, content and tools from across Office 365 in a single workspace.
- **Office 365 Groups** – connecting users with colleagues, information and applications.

Office 365 integrates easily with a whole host of other applications and cloud-based capabilities too. It means users can do almost anything they need to do from within the familiar O365/Outlook system they use every day. From customer relationship management systems and enterprise planning applications, to advanced analytics, organisations that have already defaulted to O365 don't need to look much further when adding new capabilities for users<sup>6</sup>.

<sup>3</sup> Satya Nadella to partners at Inspire 2017: 'We have an unprecedented opportunity', Microsoft, July 2017

<sup>4</sup> New to Office 365 in December—extending human ingenuity with everyday AI, Microsoft blog, December 2017

<sup>5</sup> Office 365 suite features, Microsoft, November 2017

<sup>6</sup> Office 365 Weekly: Microsoft TechNet O365 roadmap

## 5 Consistent case content management & fast retrieval via SharePoint

Despite its status as the world's leading document management system, SharePoint often isn't used to its full potential – which is a waste of a fantastic resource. Although it could so easily be used as the default platform for centralised case file and correspondence coordination – and has some sophisticated and powerful indexing and search capabilities, many organisations have unwittingly bypassed these to arrive at a range of inconsistent approaches to storing and sharing case-related content.

National Grid has been so impressed with O365-based case management in its legal department that it is now adopting the same technology across other parts of the business.

After standardising on O365-based document and email management in relation to legal matters, National Grid has seen such a positive impact on productivity and efficiency that it is extending equivalent capabilities to other parts of the business.

Rather than invest in a dedicated document management system for legal matters, National Grid wanted to make fuller use of standard software that users had already, and O365 provided just the platform. It was an approach that paid off. In a survey conducted after the rollout 87 per cent of lawyers rated their experience as 'excellent'.

Now National Grid's Risk and Head of Investigations functions have also rolled out the software - and the Company Secretary's office, Property and other parts of the business have expressed interest too.

***"Collaboration is very good, there's improved visibility of where things are and what is happening, and people are working well and retrieving content easily."***

Mo Ajaz, Group Head of Legal Operational Excellence, National Grid

## 6 IT cost efficiency & resource control

All too often, team members keep copies of documents in personal folders on their desktops, or as archived email attachments stored somewhere on the company network. As well as consuming extra storage and placing a drain on core systems, these haphazard approaches to content storage can cause confusion and error - as users fail to keep track of the correct versions of documents, or pinpoint the latest information because a team member is uncontactable.

It's also common for IT departments to develop their own custom solutions or additional features and capabilities on top of SharePoint. This can drive up costs and maintenance requirements, and compromise flexibility. As organisations look to standardise and simplify their IT estates, this approach is falling out of favour – seen as a barrier to agility and cost efficiency.

Alternatively companies may have chosen to invest in dedicated document management or specialist case management systems. These can be expensive to purchase, an effort to maintain, and limited in their ability to support collaboration – perhaps because the systems were put in to support a particular part of the business. Given that many of these same organisations also have SharePoint, a gulf is being exposed between costly, high-maintenance systems (which often carry extra costs for additional functionality such as workflow, task management and analytics/reporting), and O365/SharePoint which already includes those capabilities.

Above all, teams need to bring greater consistency and harmonisation to the way they do things. Removing legacy applications and reducing the number of different products that need to be supported are a big part of this plan - to save on effort and resources, reduce the demand for specialist IT skills, and increase confidence that anyone who needs it has access to the latest, correct case status information and documentation.



## 7 The ability to set up secure client extranets to extend case management consistency

To maximise productivity, efficiency and traceability, case teams increasingly need to be able to collaborate and share content with external contributors. As a mainstream software platform used widely across numerous industries and business functions, Office 365 is the ideal foundation for extending collaboration securely across organisational boundaries.

Via SharePoint Online, Office 365 offers the facility to set up virtual data rooms or client-specific extranets<sup>7</sup> as an external sharing option, allowing information suitable for external sharing to be separated and opened up to additional parties in a controlled manner. By defaulting to Office 365 capabilities, it's possible to make substantial savings compared with using third-party services to achieve multi-party team-working. Especially when multi-layered security has been built in to O365.

## 8 Visibility & auditing

Because of the rich analytics and reporting capabilities included as part of the Office 365 platform, it is very easy to monitor, search and report on the status of cases, and associated content and correspondence. This naturally lends the platform to case management - as a means of providing detailed insights into use of time, for instance, which could inform future task assignment.

PowerBI, part of Office 365, provides advanced analytics<sup>8</sup> around all types of content and information - a facility that dedicated document management systems usually have to add on separately.

Office 365 offers impressive integration options too, so that matters, activities and workflow can be tracked and analysed right across all of the firm's information, whether it be in an ERP, CRM system, or other diverse applications and platforms that may contribute to case management.

Unsurprisingly Office 365 also offers the best integration with Office desktop (i.e. non cloud-based) applications too, enabling advanced functionality such as co-authoring, where multiple people can collaborate on the same document at the same time. Ironically, specialist document management platforms typically rely on Office 365 to provide these capabilities - just another reason to question the sense of investing in separate software.

<sup>7</sup> Use Office 365 SharePoint Online as a business-to-business (B2B) extranet solution, Microsoft.com

<sup>8</sup> Business intelligence like never before: Power BI, Microsoft.com



## 9 Security & GDPR compliance

The security implications of managing data are a serious concern for any organisation, especially with the May 2018 introduction of the EU General Data Protection Regulation (GDPR). This places new pressure on all businesses and public sector organisations to ensure that their IT systems and cloud services are not at risk of breaches to personal data.

Records management and compliance capabilities, which are typically sold at a premium with other document management systems, come as standard with Office 365 and SharePoint. The chance to reduce or eliminate dependency on legacy or specialist applications also paves the way for compliance – by ensuring that there are no overlooked data silos, and enabling greater end-to-end visibility and control of information management processes.

Already deemed to have the most secure cloud platform with the most certifications, Microsoft includes compliance auditing and tracking of unusual activities (e.g. unusual login patterns), and provides information rights management, as part of its cloud services. It is also investing heavily to uphold the highest security measures around its cloud platform and software suites, and has a comprehensive Compliance Manager solution to help companies ensure they meet GDPR and other regulatory requirements around data handling<sup>9</sup>.

<sup>9</sup> New Microsoft 365 features to accelerate GDPR compliance, Microsoft.com blog, September 2017

## 10 Unrivalled user acceptance

In Office 365 and SharePoint, Microsoft already provides a platform for case management. But there are also powerful companion products that teams can introduce to maximise their O365 and SharePoint investments. With the right complementary products, teams can shorten deployment times, remove or minimise development and maintenance costs, increase the benefits of their day-to-day software - and avoid additional spending on specialist content management systems, that users would have to learn how to use.

Optimised options for case management teams that prioritise the user experience and maximum user acceptance include Repstor custodian – enabling Office 365 to be used as a document and email-based case management system.

### Highlights include:

- Bringing document and email based case management capabilities directly within Office 365
- Best-in-class email and document management for Outlook-centric case workers
- The ability to use SharePoint to store case-related documents, information, materials and email - applying structure, metadata, workflow processes and policy to each case type easily and consistently
- Exploiting Office 365's external collaboration capabilities, bringing structure and control to external collaborative case working and extranets
- Mobile optimisation, with an offline working option and case-centric mobile client - ensuring that remote or field-based case workers continue to store and access case information and materials using the same central file store
- Ready integration with other line-of-business management systems, time and billing applications and workflow management, for end-to-end process visibility and control
- Flexibility of configuration to meet the needs of many different departments/use cases with a single product
- No requirement for Office365 platform customisation
- Templates for common use cases (e.g. legal matter management, IT project management, customer care, general project management).

The more instinctive it is for case teams to standardise their document and email management as part of the way they already work, the greater the take-up and the bigger the impact. Repstor, a Microsoft Gold Partner and deeply experienced information management specialist, specialises in delivering an intuitive user experience and increased productivity and process consistency - natively from within the Microsoft systems that people use every day.

Repstor has an unbeaten reputation for delivering a complete Office 365-driven case management solution which doesn't require big change, big investment or big upheaval, yet improves the ROI of existing software investments and provides the results and supporting analytics that are expected now.



To find out more about Repstor's  
Office 365 case management capabilities  
[www.repstor.com](http://www.repstor.com)

