



# Outlook Is Not a Records Repository: Rethinking Email Records Management in Government

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# Presenters



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# Intelligently move, manage & govern your email & content in Microsoft 365



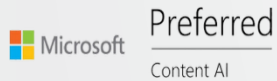
Save time &  
increase  
productivity



Improve  
governance  
and compliance



Maximize  
investment in  
Microsoft 365

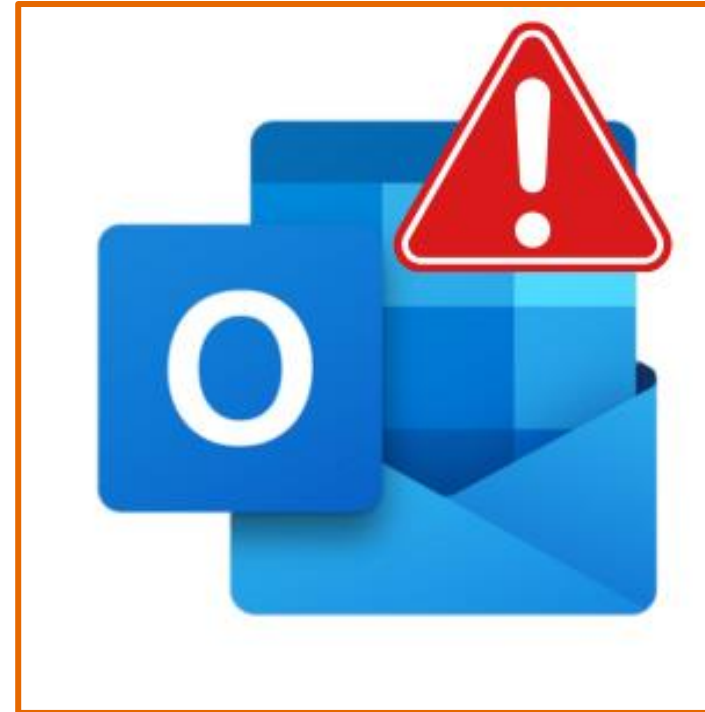


TRUSTED BY OVER 5000 ORGANIZATIONS IN 55 COUNTRIES SINCE 2000



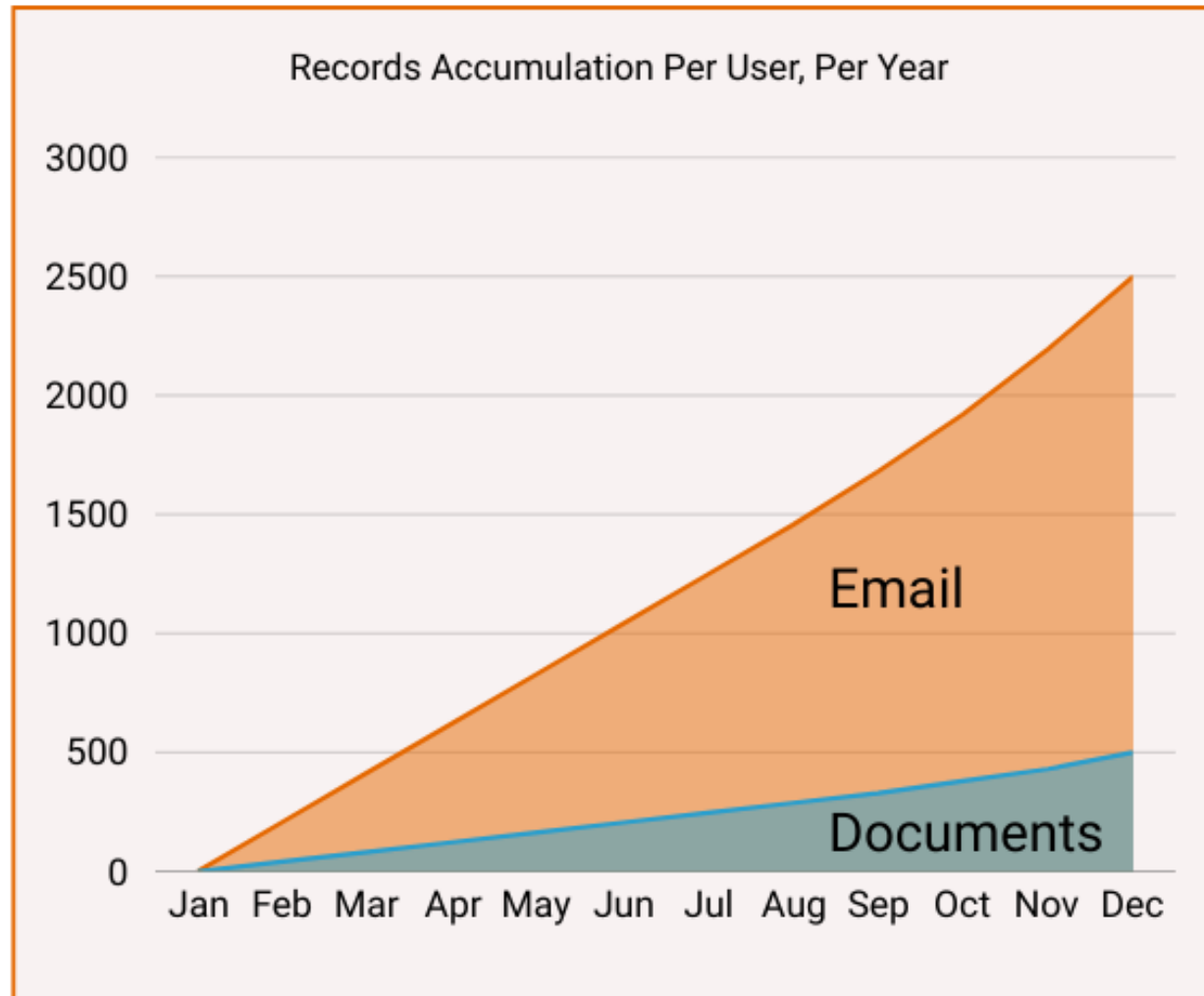
# Outlook is not a records repository

- Not compliant
- Siloed
- Storage constraints
- Poor retrieval/findability
- Deletion policies kicking in



# Why is this an issue?

80% of records come in via email



# Real-time trends

- Too many relying on Outlook as a repository
- Lack of proper retention/disposition
- Increasing compliance, storage, information request issues
- More email deletion (“non-record deletion”) policies being put in place



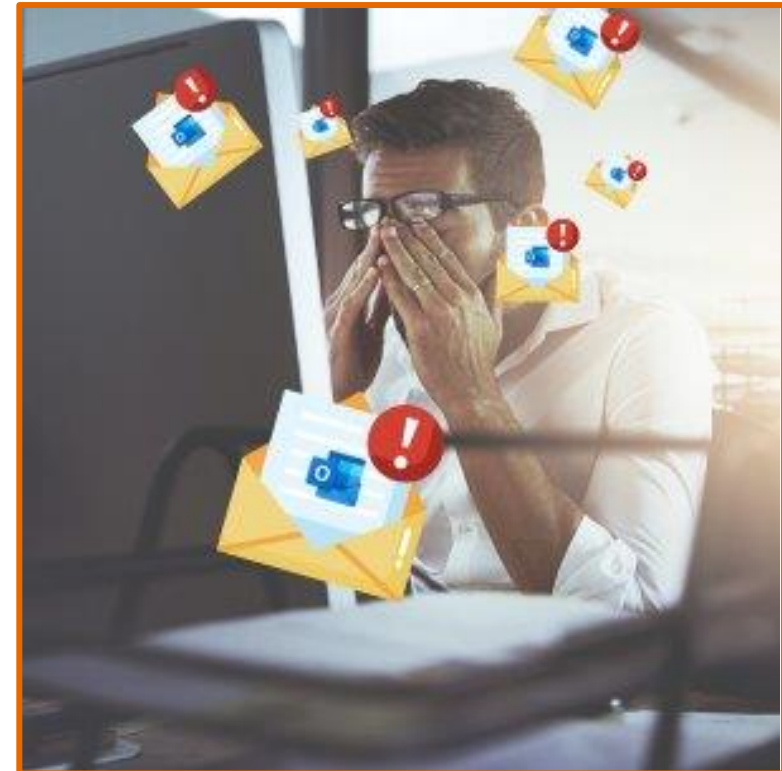
# What we're hearing. Can you relate?

- No consistent process or tooling – "Email management is a city-wide problem"
- "Email deletion policy in place, but no solution to move email records that need to be kept"
- "Very high volume of email records, creating pressure on a broken process – heavy email dependency"
- Records management programs in infancy stages; SharePoint and Purview deployments are only slightly built out
- Change management fears of implementing new deletion policies
- Turnover issues – what to do with employee & contractor information



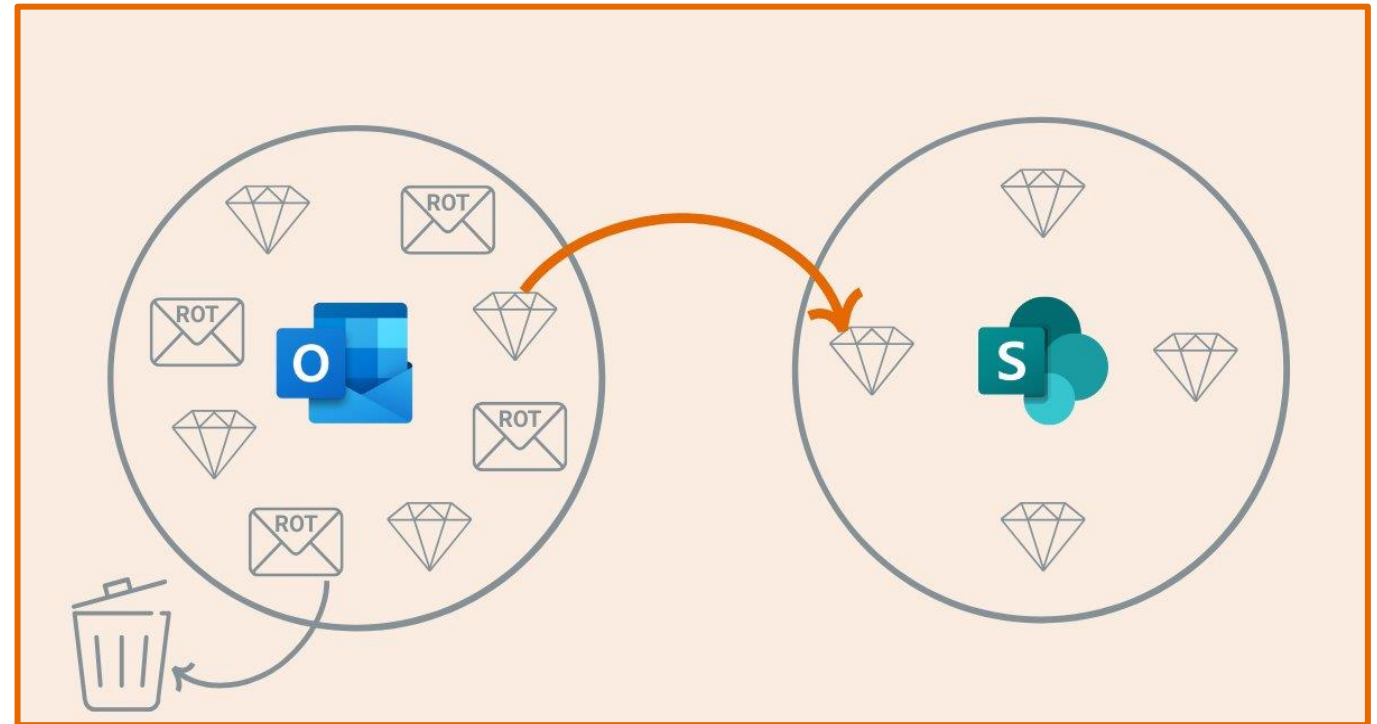
# A better path forward

- Transition from 'saving email records in Outlook' to 'saving email records in SharePoint'
- Historically, time consuming process
- But, it shouldn't be!



# Benefits of proper email management

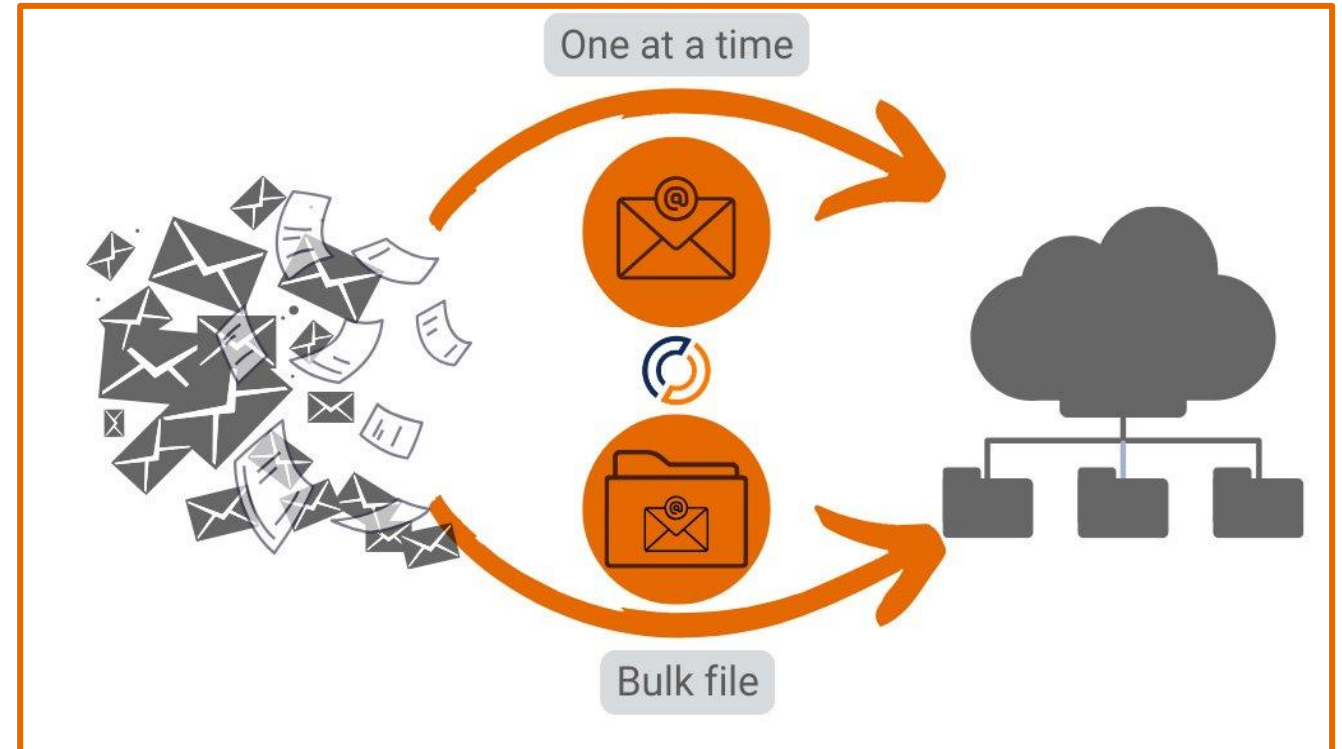
- Drive lifecycle management, compliance & governance
- Save time & cost – both in filing emails, but ALSO on search / retrieval
- Reduce security & information risks
- Create a culture of adherence to policies & regulations
- De-duplication, reduce ROT



# How to make it a solved problem

Utilize a modern & compliant email management solution:

- Bridges Outlook & SharePoint
- Low change management
- Leverages existing user permissions & retention setup
- Attachment handling & de-duplication built in
- More universal search
- Automation



# Where to start

- Provide a solution for the 'go-forward' – implement an email management solution
- Start with those dealing with the highest volume or most critical email records
- Consider past emails that may not have been filed nor tagged



# Demo

# Success Story: Large Municipal Government

# Customer overview

- Municipal government of a large City
- Delivering 100+ services to close to half a million residents
- Migrated from SharePoint On-Premise to SharePoint Online
- Began working with Colligo in 2017 originally, moved to Colligo Cloud/M365 version in 2020



# Customer challenges

- Critical City information in email:
  - Pension forms
  - Disability claims
  - Freedom of Information (FOI) requests
  - Risk management claims
- **Multiple City departments needed to capture emails & attachments as records SharePoint Online, with metadata, while staying in Outlook**



# Solution & realized benefits

## Solution:

- Colligo Email Manager deployed across key knowledge worker functions at the municipality
  - Basic for filing as they go
  - Automatic for filing from Outlook folders
- Have now filed nearly 50,000 emails using Colligo

## Benefits:

- Improved compliance & information governance
- Significant time savings and increased efficiencies
- Increased adoption of Microsoft 365

"It's a great product. It's intuitive, and I don't say that very often.... User adoption of Colligo has been extremely high. I've had few if any issues."

# Time savings by department

- **Risk Management:** saves >30 minutes per day per user with no app switching, quickly filing policies, claims, inspections
- **Human Resources:** create employee files from document sets and file many items right from Colligo
- **Work, Health and Safety:** reduced the amount of disability claims they need to scan; file claim elements to SharePoint in seconds
- **City Clerk's Office:** staff capture original FOI requests and all related documents and emails - very large volumes of data

# Calculate your ROI



## Estimate the ROI of Email Management in Microsoft 365

Estimate potential time savings and productivity gains based on your organization's usage.

How many emails are received per day by your team members?  
Radicati Group suggests the average per knowledge worker is 126 (as of 2019)

How many emails are business records that need to be filed and/or tagged into the repository?\*

Our customers and research point to ~30% of emails needing to be filed and saved

How many knowledge workers in your organization?\*

How many minutes per email can be saved using a solution like Colligo Email Manager?\*

Our research and customer feedback highlights time savings of ~2 minutes/email or 2/3 of the time.

2 Min. per email

Get a tailored pricing estimate based on your organization.

[Get pricing](#)

Time spent filing emails and records, per worker, per day  
Based on an avg. of 3 minutes per email

**37 Minute(s)**  
Annual Cost Saving at Your Organization  
Assuming average knowledge worker base salary of USD\$60,000 per year

**\$2,700,000 in savings**

# Tips for effective email management

- Drive awareness: there's a better way!
- Thoughtful email deletion policies
- Easy (even fun!) way for staff to file
- Use metadata (AI-readiness)
- Decision: retention labels vs policies
- Declare SharePoint the repository/system of record **and** build culture of compliance & governance



# 2 key takeaways

1. Outlook is not a records repository
2. There are solutions to bridge the gap between Outlook & SharePoint.

Must be:

- Easy-to-use
- Automated
- Cloud-based
- Secure
- Compliant



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# Questions?

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