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# Insurance Broker Improves Compliance & Saves Time With Colligo Email Manager

Established in 1919, Dashwood Brewer & Phipps Ltd. is an independent Lloyd's Insurance Broker. The company wanted to enable users to save emails and attachments with metadata for compliance with Financial Conduct Authority regulatory rules. They also wanted users to be able to view their emails in SharePoint Online, which was not possible in Outlook.

Using Colligo Email Manager for Microsoft 365, all team members can now save emails and attachments directly to their SharePoint Online libraries, with metadata, from within Outlook. In addition to being compliant with record-keeping regulations, the company has found significant time savings for users by enabling users to quickly search and view information on policies.

## At a glance



Dashwood  
Brewer &  
Phipps SINCE 1919

**Customer:** Dashwood Brewer & Phipps Ltd  
**Website:** <https://www.dashwood.co.uk>  
**Customer size:** Small/Medium (10-500 employees)  
**Country:** United Kingdom  
**Industry:** Financial Services, Insurance



**Colligo**

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# Compliance improves as users file email & attachments to SharePoint with metadata

## Customer challenges

Established in 1919, Dashwood Brewer & Phipps Ltd is an independent Lloyd's Broker that places both U.K. and International insurance/reinsurance business in the London and International Markets.

Dashwood Brewer & Phipps was looking for a product that would enable their over 50 users to move emails and attachments from Outlook to SharePoint Online. Importantly, users needed to save emails and attachments with metadata for compliance with Financial Conduct Authority regulatory rules.

The company also wanted to ensure users could view their emails in SharePoint Online whenever required, which was not possible using Outlook alone.

## Solution

The brokerage selected Colligo Email Manager for Microsoft 365, a cloud add-in they were able to quickly and easily deploy in their environment. The Colligo solution allows all team members to save emails and attachments directly to their SharePoint Online libraries. In addition, users save each email and attachment with relevant metadata while staying within Outlook.

*"As Colligo Email Manager is a native Microsoft 365 application, it aligned very well with our goal of fully moving to and working within Microsoft 365. The solution also provides a lot of flexibility for our team members, allowing them to work in Outlook, on the web or on mobile devices," commented Wayne Asker, IT Director.*

## Customer benefits

Dashwood Brewer & Phipps is thrilled with their ability to file emails and attachments in SharePoint Online with required metadata. As a result, they can be compliant with Financial Conduct Authority record-keeping rules and regulations.

Further, team members and stakeholders can quickly search emails and attachments to view all the information they need on a policy. Eliminating the need for users to search disparate storage areas, this saves users a significant amount of time.

*Wayne Asker, IT Director, adds, "The application has saved us time in combination with SharePoint, as it allows the viewing of a policy file in a shared location without requiring searching and access to multiple mailboxes."*

The brokerage also appreciates the added security that the Microsoft Cloud and Colligo's application offer. Users can securely work from anywhere on corporate devices without the need to access resources on the internal network.

## Colligo

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**Increased Compliance** – Users store email compliantly according to financial authority regulations.



**Time Savings** - Staff efficiently file emails and attachments to SharePoint from Outlook, without wasting time switching apps.



**Improved Search** – Team members can quickly search emails and attachments to view all the information they need on a policy without leaving the app

"The application has saved us time in combination with SharePoint, as it allows the viewing of a policy file in a shared location without requiring searching and access to multiple mailboxes." ~ Wayne Asker, IT Director

