



Cobb EMC

Electric Co-op Sees FOI and Archive Request Processing Times Reduced From Weeks To Minutes With CollabSpace



“Previously, our organization’s information was siloed and we weren’t able to search from one place. CollabSpace brought us the ability to search across systems. Not only can our internal staff use the discovery tools to find information they need, but we are able to set permissions to secure content and streamline organizational processes.”

Nick Robinson,
Enterprise RM Architect,
Cobb EMC

COMPANY

Name

Cobb EMC

Industry

Energy

Customers

Residential and Commercial Member-Owners in the Metro-Atlanta Area

Employees

This not-for-profit, member-owned electric cooperative has approximately 400 employees and counting.

www.cobbemc.com

BUSINESS CHALLENGES

- Lack of ECM Policy Resulted in Too Much Retention
- Siloed Information Limited Discovery
- Lack of Holistic Search Capabilities
- High Risk and High Costs
- Lengthy Disposition Review Process
- Manual and User-Dependent Processes

EXISTING ENVIRONMENT

- Office 365 (SharePoint, One Drive, Team sites)
- NISC Document Vault™
- Physical Storage

ECM SOLUTIONS

- CollabSpace
- Collabmail

BENEFITS

- Ensure Compliance and Improve Business Practices
- Unifying Search Results into One View
- Fast and Accurate Discovery with Search Templates, OCR, and Transcription
- Cost Savings
- Empowered Internal Team
- Better Serving Their Member Owners
- Continual In-Place Records Management with Customized Connector
- Extended Search Capabilities with Collabmail

CUSTOMER PROFILE

A not-for-profit, member-owned electric cooperative, Cobb EMC delivers electricity to approximately 200,000 homes and businesses in the metro-Atlanta area. In order to meet all their objectives of keeping the cost of electricity low to their Member Owners, they strive to keep their administrative overhead low while delivering power to their Member Owners reliably and efficiently.

The Cobb IT Team worked with Collabware in an effort to better serve their internal staff and their Member Owners. This case study will share the content management challenges Cobb EMC experienced with their previous systems, how they came across Collabspace, the implementation process and eventual victories as Cobb acquired visibility across platforms and unified content discovery.





COBB EMC CHALLENGES

Prior to using Collabware, Cobb EMC used Comsqared™ and IBM FileNet® content management systems. They were also still reliant upon physical storage of documents. This resulted in the following setbacks and limitations:

Lack of Modern ECM Policy Resulted in Too Much Retention

Prior to this project, Cobb had an outdated Enterprise Content Management policy that lacked guidelines around digital. Without process or capability to identify where items were and what needed to be destroyed, common practice was to save all content. This resulted in a large number of digital and physical objects being retained, at times redundantly, so Cobb had limited visibility to what was actually stored.

Siloed Information Limited Discovery

Beyond not having clarity of what information was stored, Cobb internal staff also had difficulty searching for the content they needed. For example, with their customer service platform, Member Services, similar information had become siloed into two locations based on time period, and the Cobb internal team could not search across locations for unified results.

Lack of Holistic Search Capabilities

One of Cobb's biggest challenges was lacking a solution that could search across their major content repositories, including unstructured data. The previous system used contained a plethora of documents from across the business and while it was easy for end users to deposit items, it became unyielding and difficult when searching for content/historical artifacts. Search was not only slow, but could only surface native content stored system by system and not from external file shares. Fulfilling processes such as an Freedom of Information (FOI) request could anywhere from two weeks to several months.

High Risk and High Costs

Without an Enterprise Content Management policy or tool to enforce the necessary policy procedures, Cobb EMC's previous program lacked compliance. This left the organization vulnerable to litigation risk and high costs. For example, without proper clarity and accessibility to their stored information, it was difficult for Cobb to conjure specific documents for legal discovery. When legal discoveries were issued, the IT team had to export hundreds of gigabytes of data onto external hard drives for corporate and opposing counsel, resulting in costly document reviews.

Lengthy Disposition Review Process

The large volume of electronic and physical records also resulted in uncertain, lengthy disposition review processes. And with the lack of visibility of what was stored across platforms, much of the organization's content continued to unnecessarily build up over time.

Manual and User-Dependent Processes

Outside of Cobb's backup retention policy, everything was manual and end-user dependent. When a discovery request was made, they had to suspend their backup retention schedule to hold backups indefinitely which required all records to be frozen and were costly to purchase.

These type of processes, complicated prior systems and a slow and limited search experience frustrated internal staff and placed pressure on Cobb IT team's credibility.

BREAKING POINT

With the prior systems and content management practices, Cobb found itself with discovery challenges that were costly and left the organization at unnecessary risk.

Moved into action with realization that updating the data environment would provide proper legal coverage and could no longer be delayed, Cobb leadership gave the IT team the go ahead in 2013 to begin creating and implementing policies such as an updated retention schedule and tools to support it.

FINDING A SOLUTION

With the project approved, Cobb hired a third-party consultant, Montaña & Associates (M&A), to define the legal parameters, identify a plan and galvanize the project goals. With M&A's support, they built out an RFP and a product demo score grading each solution put forward. In 2017 Cobb selected Collabware as the vendor/partner of choice for their cloud-based solution, Collabspace.

The Cobb IT team's decision to select and implement Collabspace was based on several factors, including:

- Collabware investing in and building a connector to NISC's Document Vault.™ This was absolutely pivotal since Cobb continues to use this unstructured data repository to support business processes.
- Collabspace would also address business needs based on corporate policies of retention, disposition and legal holds.
- Cobb knew all of their Office 365 content would be accessible in Collabspace and they could set up automated, unified retention and disposition rules and policies.
- Collabspace has the ability to pull all records from across multiple, disparate systems, which, topped with OCR and transcription, will open the door to an accelerated way to find data.

IMPLEMENTATION

Upon selection of CollabSpace as their new system, Cobb EMC's internal IT team worked with the Collabware Services Team to implement CollabSpace and improve their overall ECM processes. This included the following steps:

Content Migration

For this project, Cobb had to get information off of SharePoint on-premise and into SharePoint in the Cloud. They also moved a great deal of data from their previous on-premise platform, IBM FileNet®, onto SharePoint in the Cloud so all data would be streamed into and accessible via CollabSpace.

Re-earning End Users' Trust

Cultural aspects had to be addressed: the Cobb IT team were looking to re-earn trust and confidence within their organization after negative past experiences implementing other software tools. This required them to go into departments and sell a different records approach, followed with providing some light guidance once the solution was implemented to promote user adoption and success.

Multiple Meetings during Refinement

Refining functionality to develop the NISC Document Vault™ connector required frequent scheduled and unscheduled meetings between the Cobb IT and Collabware Project Management teams. The door was open for Cobb to give invaluable feedback during development that aligned to their needs. In the end, the product exceeded what was anticipated. The approach was consistent communication, and trust was created as Cobb received the support and commitment to deliver from Collabware.

"We had multiple meetings with the Collabware development engineers working out details and issues together. When we would show Collabware staff that things weren't working as we needed them to, they would go back and redevelop.."

Cliff Reisig, IT Project Specialist, Cobb EMC

“

Throughout the implementation process, we were able to keep an open dialogue going. If I needed something, I was always able to reach out and say: 'Hey, I have a problem,' and something would happen. Communication with Collabware was open and responsive."

Nick Robinson,
Enterprise RM Architect, Cobb EMC



“

A request for Safety Compliance and Training documents used to involve two departments and three platforms. Cobb now has a single search point and can get comprehensive results in minutes.

Nick Robinson,
Enterprise RM Architect, Cobb EMC



VICTORIES/ADDRESSING THE CHALLENGES

Ensure Compliance and Improve Business Practices

Working with Collabware offered Cobb EMC the flexibility to adapt to changing business requirements while meeting corporate policies and remaining compliant to industry, federal and state regulations. Unifying content onto a WORM-compliant, ransomware-proof platform not only improved discovery for all content types, but provided access to automated document lifecycle workflows and review lists to simplify and streamline the disposition review process.

Unifying Search Results into One View

For the first time, Cobb now has access and visibility across content platforms from one straightforward interface. Previously reliant upon physical storage, they can harness their information in a searchable environment while still retaining required physical copies. This is a major step towards reducing the previous warehouse content clutter.

Fast and Accurate Discovery with Search Templates, OCR, and Transcription

With Collabspace, Cobb is well on their way to fulfilling their master plan of making everything searchable no matter what system the content is in. Both unified search and the customizable shareable search templates ensure results accuracy and expedite previously lengthy discovery processes, such as fulfilling FOI requests. For example, an employee records search that would have taken the Cobb team anywhere from weeks to months to fulfill based on previous content stacking can now be completed within Collabspace within minutes.

Cost Savings

By unifying and expediting content discovery across systems, Cobb EMC can now surface content necessary for procedures such as Holds and FOI requests more quickly, which will not only save the team time, but result in major resource and cost savings moving forward. Streamlining the content volume provided to legal teams cuts down significantly on costs related to reviewing documents.

Empowered Internal Team

The automation offered by Collabspace relieves the IT team, giving them holistic retention/disposition capabilities. Beyond IT, great user-adoption amongst internal teams has also been achieved. Staff are now empowered to perform their own records management processes that have been actualized in optimized search queries, creating search templates that are shared amongst their teams, and more.

Better Serving Their External Member Owners

By reducing these costs and increasing efficiencies, not only is Cobb EMC able to help improve the processes and simplify the tasks of their internal personnel, but they can also act faster to better assist whenever external Member Owners or suppliers request content, such as Easement documents. By maintaining their administrative overhead, Cobb EMC can continue to deliver power to their Member Owners reliably, efficiently and keep the cost of electricity low.

Accelerated Activation with Customized Connector

Cobb EMC continues to use NISC's Document Vault™ as a legacy system to support business processes and house unstructured data such as correspondence and blueprints. The Collabspace connector allows Cobb to understand what content is being stored, apply records management compliance and continue doing business as usual.

Extended Search Capabilities with Collabmail

In addition to the victories brought on with Collabspace, a few of Cobb's internal staff departments, including Human Resources, found success with Collabmail, an email records management tool provided by Collabware. By integrating Outlook and SharePoint, Collabmail gave users access between their inbox and content libraries for another method of quick, easy search for business-critical messages and attachments.

CONCLUSION:

By implementing Collabspace, Cobb EMC was able to employ compliant business policies, unify content within one view, and improve eDiscovery with optimized, cross-platform search and shareable search templates. This not only mitigated risk, saved costs, and took pressure off of the IT team, but has empowered internal staff to work more autonomously, efficiently, and better serve their Member Owners and the community.

WHAT'S NEXT FOR COBB EMC & COLLABWARE?

Cobb EMC is staying front and center with Collabspace Physical Records capabilities. The organization also has plans to take further advantage of the solution's full compliance lifecycle capabilities by migrating in content from other sources, applying more specific retention policies, and further defining metadata definitions to integrate even more libraries into their searches.

For help on your next project, call us at 1-855-268-0442 or email: contact@collabware.com