The background is a dark grey field filled with various geometric shapes, primarily triangles and polygons, in shades of blue, orange, yellow, and green. Some shapes are solid, while others are semi-transparent or have patterns like white diagonal lines. The overall aesthetic is modern and tech-oriented.

# SharePoint Transformed: A Game Plan for Digital Workplace Heroes

How to Improve Speed of Delivery, Boost  
Employee Adoption, and Enhance Governance

# About the Authors



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# How This Guide Can Help

With the rapid increase in technology innovation, many organizations are looking for ways to optimize or transform their business workloads to gain greater competitive advantage. The move toward a digital workplace, however, is not just about technology—but also about aligning business processes, enabling people, and improving culture.

“The risks of not embracing IT consumerization and mobile collaboration are twofold. On the one hand, a business that enables its workforce to collaborate better will have an efficiency and innovation advantage over one that does not. But on the other hand, levels of collaboration can actively deteriorate in organizations that make poor attempts to modernize their systems.”

**Gartner: Benefits of mobile collaboration, Jeff Mann, ComputerWeekly, 2013.**  
Retrieved from  
<http://www.computerweekly.com/opinion/Gartner-Benefits-of-mobile-collaboration>



This guide was created as a resource for leadership teams, collaboration managers, and other business and technical leads who have been tasked with moving their company from functional collaboration toward a truly digital workplace.

Building a digital workplace is a cross-functional effort involving many different stakeholders from across the organization. Enabling social content sharing is a starting point, but for many teams and business processes, you'll need to take it further to realize the advantages you seek. The leap from focusing on your employee intranet portal to delivering and demonstrating real value in the reinvention of your key processes is a big one. The potential benefits, however, are numerous and can help your organization improve alignment of business goals, technology, and measurements.

For Digital Workplace Heroes like you, this can be a challenge, but also a unique opportunity to have a profound positive impact on your organization and its workers. To be successful, you'll also need to find balance between delivering a flexible and modern solution for your end users, and maintaining corporate governance standards.

While much of this guide focuses on the SharePoint ecosystem, many of these best practices can be applied to any collaboration platform or solution. Any business transformation can offer big challenges—this guide was organized as a resource for your planning efforts, and to provide several options based on our experience and that of our customers.

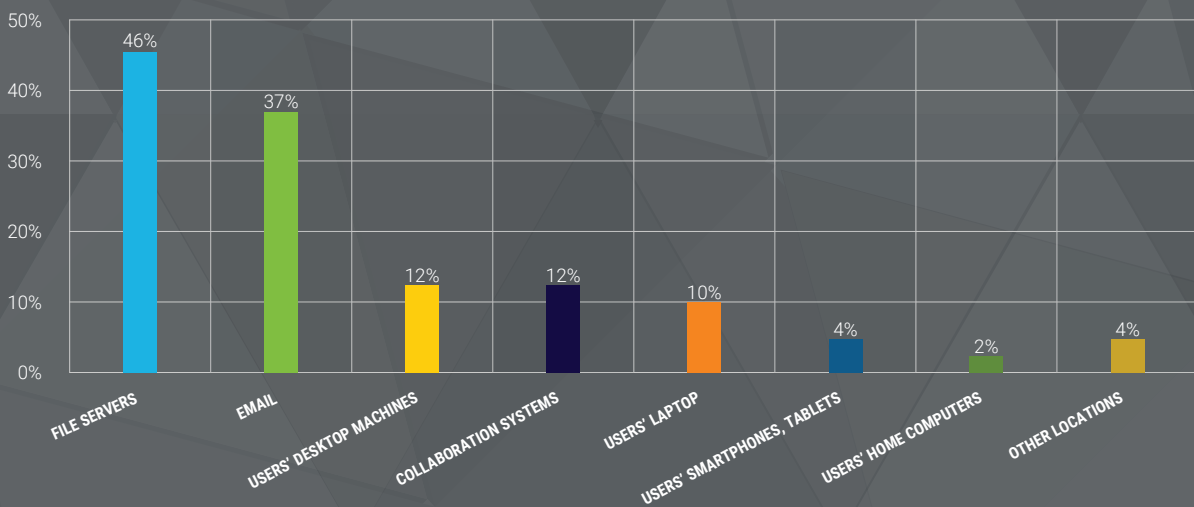


# Rise of the Digital Workplace

Productivity solutions are everywhere, with end users able to easily purchase and leverage solutions outside of the purview of the IT team. Part of SharePoint's long success has been its ability to help teams quickly collaborate, often with minimal IT involvement. However, it can't address every business use case. With the growing number of collaboration and communication solutions available within your organization, information can become scattered across many systems—making it increasingly difficult to monitor and manage solutions and protect your data.

## Information Scattered Across Many Systems

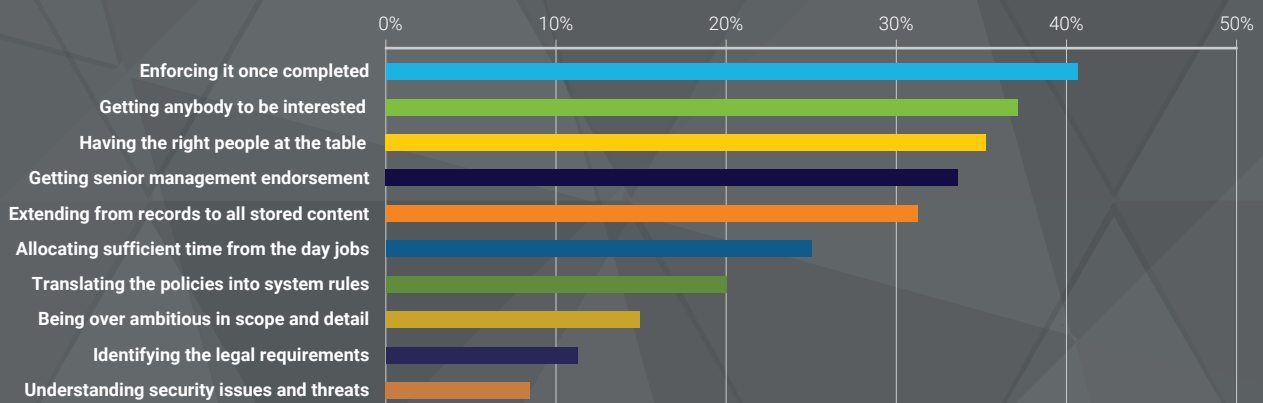
Proportion of Electronic Content Stored in Various Locations



Osterman Research, Inc. [http://www.tbline.nl/index\\_htm\\_files/Osterman-The%20Importance%20of%20File%20Archiving.pdf](http://www.tbline.nl/index_htm_files/Osterman-The%20Importance%20of%20File%20Archiving.pdf)

## Policy Being Hindered by Difficulty of Enforcement

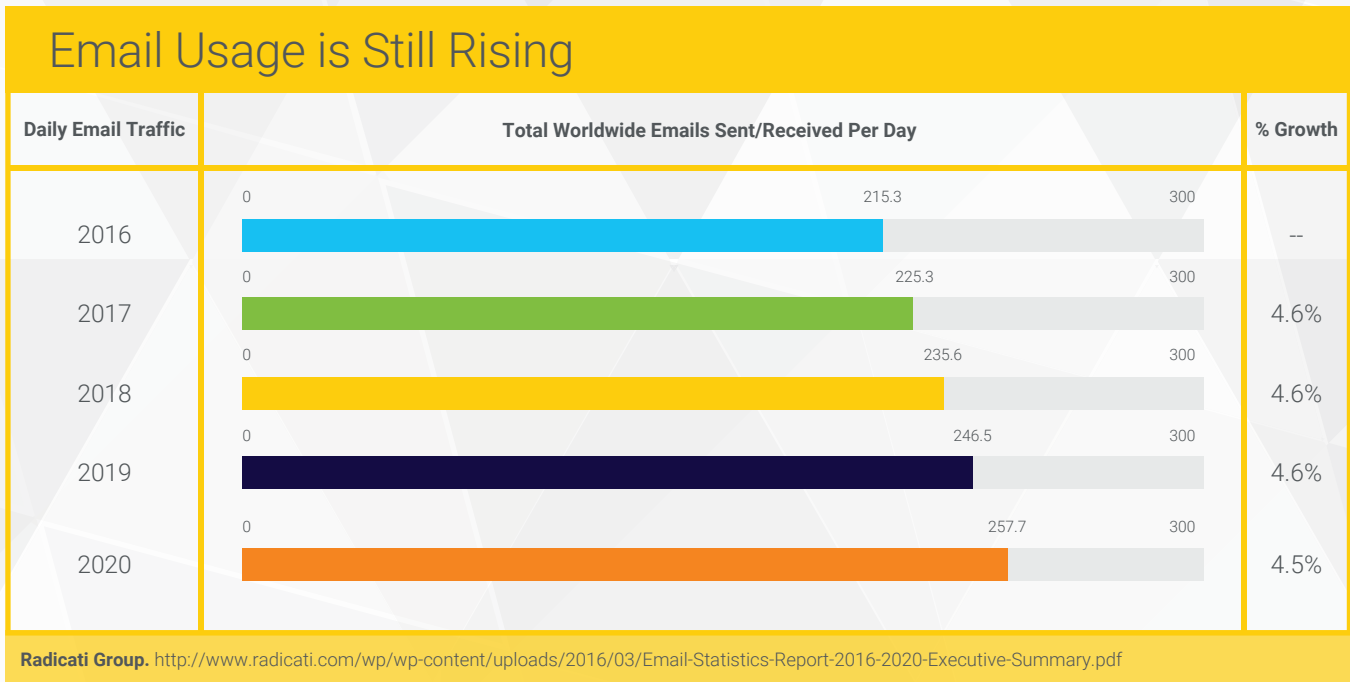
What Have Been the Three Biggest Issues with Creating an Information Governance Policy?



Information Governance: Too Important To Be Left To Humans, AIIM, 2015.

There is no single system, tool, or platform that can provide all of the capabilities required to run your business, so we pursue different technology solutions. Yet the new tools are not necessarily displacing the old.

Email is a great example: once predicted to disappear within the enterprise, corporate email usage continues to rise with deep ties to most other workloads—creating even more clutter and chaos for enterprise IT teams.



As a Digital Workplace Hero, your goal should be to streamline, modernise, and transform your internal systems and business practices, improving customer, partner, and employee experiences.

The vision of the digital workplace is an organization that is:

## Collaborative

Empowers employees to work individually or collaboratively.

Helps people to find information and leverage organizational expertise on demand.

## Nimble

Works across technology and organizational silos.

Responds to industry and economic changes to innovate ahead of the competition.

## Secure

Provides transparency of data and communication.

Captures the collective knowledge and expertise of their employees.

Many companies we work with have found it challenging to identify solutions that realize this complete vision for highly governed roles. What defines a governed role? One where compliance is imperative for regulatory or business performance needs. For example, utility technicians in the field must have received and read the latest safety bulletins. Contract administrators must capture and retain change orders sent via email in order to share them with the project team as well as for possible discovery in the event of a legal dispute.

As the leading intranet solution, SharePoint often sits at the center of many of these digital workplace initiatives, providing many of the core collaboration and communication capabilities that your organization needs. However, shifting to a digital workplace is as much about process alignment and cultural change as it is about technology.

Collaboration may power the digital workplace, but achieving your collaboration goals takes more than technology—it requires close attention to how the technology aligns with your business processes and collaboration culture.

# Three Forces

## Driving Your Business Transformation

Whether or not you are ready, your business transformation is underway. Understanding what's behind the transformation is the first step in taking ownership of that change. There are three forces that Digital Workplace Heroes must understand to be successful.



## 1

# Business Processes Are Increasingly Digital and Mobile

Within the last decade, there has been a foundational shift in how information workers collaborate. Digital is replacing paper-based activities, and mobile solutions are moving key workloads from the desktop to any device, anywhere in the world.

To remain competitive, businesses must examine every business workload and look for opportunities to not only increase output, reduce costs, and streamline for optimal efficiency, but also better align with this shift in how employees work and collaborate.

- Corporate screens are getting smaller.
- Solutions are becoming more intelligent, social, and dynamic.
- Data and measurements are generated automatically
- Our tools are able to learn from our behaviour, adapt to our changing needs, and continually improve.

## Enterprise Management of Content

- 46 percent of enterprises still using file servers
- 37 percent primarily using email
- Only 12 percent currently leveraging collaboration systems

The Importance of File Archiving, An Osterman Research White Paper, Osterman Research, Inc., 2013

**Microsoft CEO Satya Nadella famously stated that:**  
**“devices aren’t mobile, people are”**  
*– meaning that instead of becoming mobile-device friendly, the focus should be enabling the users to be mobile, which means across our physical corporate boundaries and across our corporate device boundaries.*

Historically, there has been a disconnect between IT and business users. The digital workplace means putting communication and collaboration at the center of your planning efforts to bridge this gap. When organizations are able to make this shift in thinking—giving technology, process, and people equal footing in the planning process—employees become more engaged, processes become more efficient, and greater business value is achieved through existing platforms.



## 2

## There is a Usability Gap

As enterprise control over content becomes more complex, it becomes increasingly difficult for employees to communicate and collaborate, leading to inevitable trade-offs in usability.

Many employees feel they have no other choice but to go around IT processes to get work done, creating rogue or “shadow IT” efforts as employees look to fill usability gaps on their own.

### Identifying the gap:

- Fundamentally, people want to get their work done, but IT is often stretched to provide the features users want in a timely manner.
- Consequently, employees turn to unsupported, non-compliant, and potentially risky applications and services.
- Adoption of SharePoint and other centrally-managed solutions is impacted.
- Complicated systems become more complicated.

### User Adoption is a Persistent Issue

“User adoption has been and continues to be something of an issue for 58 percent of our respondents with indication that poor or inadequate training and lack of management support are still the perceived reasons.

This is an indication of human deficiency, rather than technological deficiency. It is not the technology that is failing the organization in as much as it is the organization failing the technology.”

**The Impact of SharePoint, AIIM, 2016.**

How you manage your collaboration platform—from engineering activities, to risk management and compliance audits, to the overall change management and IT ticket prioritization—is essential to your ongoing success. Soliciting feedback in the open can quickly reduce the usability gap and increase adoption. Workers want the ability to work from anywhere with common UX elements regardless of which device they are using. The more you involve employees in the process, the more likely they will be willing to support that process—even if there are gaps in features and functionality.

## 3

## The Link Between Change Management and User Adoption


Collaboration succeeds when your planning begins and ends with the end user experience. If your goal is a collaborative digital workplace, your journey must focus continually on user adoption—are people following the new business processes?

You cannot measure a tool or process if people are not participating. Simply put, without actively engaged employees, you will not have the data necessary to iterate and improve upon your systems and processes, or achieve your vision of a collaborative digital workplace.

- With a transparent operational model, users are better able to understand the tradeoffs or limitations of the platform.
- When people understand, they are more likely to work with IT and management to prioritize future solutions.
- When employees are recognized for identifying limitations or suggesting improvements, they are more likely to help.
- Successful change management includes visibility into the status and metrics of user inputs.

The key to getting users to adopt your platform is to lower the barriers to collaboration. The more rules you put in place, the less likely employees are to use the platform. You need to implement compliance and security issues, of course—but you should work closely with your "power users" to identify what they want and need, prioritise their requests, and then keep communicating through design, test, and delivery.

While finding the right technology fit for your organization's culture is important, any tool or process can be configured or refined with the right change management process—and build a culture where employees feel empowered to speak up and share their opinions and experiences.



“Technology supporting a digitally integrated workforce gets stronger and more robust every year, enabling enterprises to keep a very dispersed team on the same page logistically and moving toward the same goals... Today's workforces are freer to go where they want to work instead of staying where work originates...

Whether the employee is working remotely, working as an "on-demand" employee, or just checking emails from their phone on the bus ride into work, an enterprise is responsible for creating a culture of security and secure data among its staff.

This is leaving CEOs, IT managers, HR, and the rest of the C-suite stuck between a rock and a hard place on how to manage all of these changes and implement a digital system that balances both workers' needs and the company's.”

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**Deloitte Perspectives, Digital Workplace and Culture.**

Retrieved from

<https://www2.deloitte.com/us/en/pages/human-capital/articles/digital-workplace-and-culture.html>

# Becoming the Digital Workplace Hero

As we work with customers around the world, we see a common thread within companies that are successful in transforming their businesses: there is always someone who steps up, takes charge, and drives the change. Within the modern enterprise, we are members of various communities—from communities of practice (think project management organization, or human resources) to those built on hierarchies (front-line managers, or executives). Engaging community managers, evangelists, and influencers can be the difference between successful collaboration and failure.

Realizing actual business value from process transformation takes concerted effort. Digital Workplace Heroes need to learn to work with these workplace influencers to ensure that they realize the advantages of new tools, and that they are supported in articulating the value to the community.

Good collaboration streamlines business processes and empowers employees, but good collaboration also requires consistent oversight and community management. As the Digital Workplace Hero for your organization, how can you mitigate the inherent risks that come with change of this scale, and work to ensure the success of your business transformation?



Is the role of the Digital Workplace Hero to be a change leader? An influencer from within the guiding coalition? Or simply a highly-engaged internal stakeholder? In our experience, the Digital Workplace Hero is all of the above, helping to bridge the gap between your organization's future vision and the day-to-day reality of keeping employees engaged and productive. Your influential role is often the key to convincing both your peers and your leadership team to stay on the right path forward.



### **As the Digital Workplace Hero, you play a key role in helping your organization:**

- Increase your speed to the cloud
- Maintain and improve end user adoption
- Reduce the cost of transformation
- Reduce the inherent risks that come with change
- Improve company-wide productivity and governance

Here Are Three Steps to Help You “Own” the Role of the Digital Workplace Hero...

# 1

## Understand Your Options

While transforming your business into a digital workplace requires more than a technology upgrade, this is definitely a core component. As such, it's important to understand the options as you weigh the alternatives, enabling your company to increase performance and end user productivity.

### In-house customizations

While the out-of-the-box SharePoint provides many of the core components your company needs, there may be customizations and additional licenses required to make the solution work to meet your unique company needs.

**Advantages:** You can leverage your existing SharePoint environment, and utilize existing personnel to design and build your solution.

**Disadvantages:** Even if you have the right skills within your team to build it yourself, additional build/test/support time can be costly, and result in additional IT burden.

### Purpose-built solutions

Within any industry or vertical, there are a number of vendors who have developed "packaged" solutions, many of them outside of SharePoint, that can dramatically speed up your build, and can be quickly deployed and modified alongside SharePoint.

**Advantages:** These solutions are generally thoroughly tested, high-performance, and extensible, and enable you to build capabilities to meet your specific requirements.

**Disadvantages:** Maintaining a packaged solution can be expensive both initially, and in ongoing support and maintenance. Additionally, these options likely include cloud components, with possible loss of control over data.

### Off-the-shelf solutions

As SharePoint has matured, many Microsoft partners have developed solutions that provide much needed features, but that also work natively within SharePoint with little to no impact to your environment or IT overhead. Many solutions offer an improved user experience (UX) and strong administrative control.

**Advantages:** Leverage the full capabilities of your existing SharePoint environment with minimal impact to your IT team. Additional costs are offset by reduced support costs.

**Disadvantages:** Additional product or solution licensing.

Your approach depends largely on the skills and availability of your existing organization, and whether you want to be in the business of building and maintaining custom solutions—or leverage the expertise of others.

Your focus should be on ways to help your organization improve both team and individual productivity, increase utilization of existing and future technologies—such as SharePoint and Office365—and optimize your business workloads.

In other words, to make your business transformation "stick" you need to focus on people, rather than technology.

# 2

## Develop Your Strategy in Collaboration with Information Workers

When a collaboration platform like SharePoint meets both the requirements of the business users and the security, compliance, and governance constraints that the IT organization is responsible for managing, adoption improves dramatically—and adoption has a direct link to productivity. Even the most up-to-date technology, rolled out on time, under budget, with all of the latest features, and built perfectly to manufacturer specifications will fail if end users do not adopt it. The secret is to ensure that IT works closely, and iteratively, with end users to develop a collaboration platform that meets the needs of both constituencies.

Regardless of your technology approach, your digital workplace transformation requires a certain level of acceptance from across the organization—from the executive team down to the end users. Why is it that some solutions or innovations are readily adopted and others fail to find a foothold within your corporate culture?

Within his ground-breaking book 'Crossing the Chasm,' author Geoffrey Moore discusses a number of strategies for crossing the "chasm" of adoption between market (or organizational) segments, which are based on the 'Diffusion of Innovations' theory. This theory argues that there is a chasm between early adopters (technology enthusiasts and visionaries) and the early majority (pragmatists). Moore argued that moving from early adopters to the early majority is difficult because the personality traits of these two groups is so very different.

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**Moore. Crossing the Chasm:** Marketing and Selling High-Tech Products to Mainstream Customers. 1991. Harper Business Essentials

You can begin to see where the role of the Digital Workplace Hero can have a powerful impact within the organization, helping the early adopters to document and promote their business wins, to build momentum around a new solution. But to successfully cross that chasm, it requires continuous support and innovation.

## Your Strategy Should Change as Adoption Improves

- At the launch of any new innovation, messaging should focus on innovators and early adopters.
- As innovator and early adopter adoption increases, document early tangible successes, demonstrating clear business impact and ROI.
- Provide general awareness to the early majority, but keep it scarce at first to keep innovators and early adopters engaged.
- As early majority adoption increases, increase general awareness and reinforce through training.
- Begin working with innovators and early adopters on extending/optimizing the innovation, ensuring they remain engaged, while also focusing on future needs.
- Maintain growth of early and late majority by creating a culture that builds optimism and self-confidence by recognizing and rewarding achievement, which creates momentum.

At the center of Moore's theory is communication. When communication is strategic and strong, and when business users and IT work together on a shared vision of what the system should be, success is far more likely.



In his book 'Leading Change', John P. Kotter, Professor of Leadership, Emeritus at Harvard Business School, developed an 8-step methodology for accelerating organizational strategy implementation. His business transformation model provides a practical approach, focusing on leading—not managing—change.

Teams are better able to deliver transformational change by requiring advocacy and communication throughout the planning and implementation process, with operational managers working closely with all stakeholders to create “a sense of urgency about the task in-hand” to identify the right business drivers.

Change happens when there is a crisis, and organizations are able to come together around a shared understanding of these business drivers: unhappy customers, rising costs, reduced budgets, and growing competitor advantages. All of these can spark lasting organizational change.

### **Kotter's 8-step model for effective change management:**

- 1. Create a sense of urgency**
- 2. Build a coalition**
- 3. Form a strategic vision and initiatives**
- 4. Enlist a volunteer army**
- 5. Enable action by removing barriers**
- 6. Generate short-term wins**
- 7. Sustain acceleration**
- 8. Institute change**

One way to remove barriers to adoption is through native apps that fit with the ways in which employees work, making it easy for them to adopt. Aligning technology and business workloads gives managers the ability to monitor process compliance in the long run. Initiatives succeed or fail when your organization fails to support a process for the people side of change, or spends too much energy resisting the change management process. Success requires consistency, transparency, collaboration, and iteration.

# 3

## Maintain Strong Feedback Loops

The secret to success is to monitor and manage change through clear communication. Being able to monitor for compliance gives leaders true insight into what people are doing. You can then tailor your communication to reward and reinforce teams that are complying, and engage in discussions with teams that are not to find out why and take appropriate action.

Lasting change doesn't happen without open and honest dialogue—and a shared sense of purpose. Not that there won't be conflict. As Kotter described, it sometimes takes a great sense of urgency to pull people together and drive an initiative forward. Conflicts will arise—but conflicts often cause leaders to emerge, which can also help an organization to find clarity of purpose.

Having two-way communication is key, allowing for collective sense-making—and ensure that what is proposed and delivered are driving business value.

# How Colligo Can Help

You are a leader of change as your organization's Digital Workplace Hero. Colligo understands the options that are available for improving collaboration end-to-end. Our customers develop flexible, scalable strategies for SharePoint and other Microsoft workloads where governance is a priority. Furthermore, Colligo solutions improve the administration of these very complex workloads, providing much needed transparency to help your team develop and maintain strong communication channels.

Colligo's apps for the digital workplace extend Microsoft SharePoint, Office 365, and OneDrive for Business. They open up access for every worker to contribute to corporate information in any content store, on any device, from any location. Pairing them with the centralized configuration and reporting console ensures that your corporate data is secure, and your teams are productive.

Colligo Console allows non-IT administrators to control and monitor what information is accessed and by whom, helping them to enforce compliance and focus on improving adoption.

Colligo can speed up your path to implementing a digital workplace by:



1. Increasing transformation speed



2. Improving employee adoption



3. Controlling transformation costs

For Canada's leading holiday travel airline, Air Transat, Colligo Engage allowed the company to improve information governance and replace slow, labor-intensive paper-based document distribution across airports.

A recent employee survey showed a 91 percent user satisfaction rate with the Colligo app, with Colligo helping Air Transat to increase flight director efficiency by making it easier for them to navigate and find information, and safeguard governance mandates by increasing process visibility through dashboards with usage metrics.

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[\*\*Read the case study\*\*](#)

## Success Story: Increasing Transformation Speed

For many organizations, the time it takes to transform their business processes is as much of a concern as the decision itself. Any enterprise-wide change is going to be difficult, but Colligo can help an organization dramatically speed up the time it takes to transform, helping customers quickly adopt, adapt, and be productive.



# Success Story: Improving Employee Adoption

The modern organization uses dozens of standalone solutions to solve their collaboration needs, which creates numerous information silos that can increase the cost and complexity of collaboration. In our efforts to improve collaboration, we often prioritize short-term gains over long-term productivity, and then wonder why employee adoption suffers over time. Colligo can have an almost immediate effect on employee adoption and improve enterprise collaboration.

Already a dedicated SharePoint user, privately-owned dental product and equipment distributor, Benco, needed a solution that would enable easy iPad access to thousands of continually changing manufacturer documents, videos, and data.

Using Colligo Engage, SharePoint automatically syncs content, giving sales easy offline access to the latest sales collateral. Colligo has allowed Benco to broaden SharePoint adoption by 20 percent, increasing customer satisfaction by empowering sales associates to answer questions and provide accurate data.

Overall, sales productivity increased by 15 percent by enabling them to respond on-site, cutting the need for follow-up time back at their desks.

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[Read the case study](#)

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For Pernod Ricard, the second largest wines and spirits distributor in the world, Colligo Engage has extended SharePoint with mobile content management capabilities including governance, auditing and reporting. This has enabled business owners to deploy content and produce reports without the need to involve IT, while centrally controlling the distribution of content to the native Colligo Engage app.

The automated solution lets executives, marketing and commercial teams read, revise and organize documents even when they are offline, reducing support costs, improving efficiency, and empowering business owners to leverage SharePoint with minimal IT involvement.

Pernod Ricard had planned for the deployment to take months, but with Colligo Engage, they were able to deploy and train employees within weeks, reducing overall transformation costs.

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**[Read the case study](#)**

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## Success Story: Controlling Transformation Costs

Improved transformation speed and strong employee adoption are important to any digital workplace transformation, but it is also important to control the costs of transformation—as well as your ongoing operations. Colligo is the most cost-effective strategy for your business transformation, allowing you to move quickly while also improving end user engagement and adoption. And the faster your transition, the lower the cost of your transformation.



**Pernod Ricard**

# A Final Thought: The Importance of Collaboration

A 2016 global survey conducted by Oxford Economics and sponsored by SAP showed that three out of four (74 percent) of the best-managed companies facilitate collaboration in the workplace. Entitled 'Getting Collaboration Right,' the study looked at the collaboration traits of 4,100 executives and employees from some of the world's most digitally savvy organizations. Here are a few of the key findings:

SuccessFactors.com.

[https://www.successfactors.com/en\\_us/lp/leaders-2020-getting-collaboration-right.html](https://www.successfactors.com/en_us/lp/leaders-2020-getting-collaboration-right.html)

## The world's highest-performing companies have distinct collaboration traits:

- **They believe that teamwork begins at the top**, viewing leaders as facilitators and active participants of collaboration.
- **They are willing to invest in a collaborative culture**, and are significantly more likely—by 20 percentage points—to view decision-making as being distributed across the organization.
- **They actively leverage collaboration platforms**, with leaders as visible participants within their collaboration communities, not just paying lip-service.
- **They consider collaboration an employee benefit**, and a central part of their corporate culture, with 60 percent of very satisfied employees reporting that their organization provides technology to facilitate collaboration, compared with only 32 percent of dissatisfied employees.



There is a growing need for leaders who not only understand the value of collaboration—but who focus on the overall success of these collaboration initiatives. Your company culture—and how well you adapt to change—can be a determining factor in your transformation success.

Organizations now broadly recognize collaboration as a business necessity, and stakeholders are looking beyond simple adoption metrics. They want to understand how their teams are using the platform—and how they solve the end user adoption gap.

If your organization has historically been slow to respond to end user requests in SharePoint—from improvements to search, to the rapid deployment of new site structures to meet growing business needs—individuals will look elsewhere for the answers. While a push by end users to bring in the latest consumer-focused productivity solutions may appear to move your organization toward a digital workplace, the opposite may actually be true. Without the support of IT and management, any misstep or breach will be greatly amplified.

That's where your role as a Digital Workplace Hero can help steer your company in the right direction, and where solutions like Colligo Engage can help—by increasing the speed of your transition while improving employee adoption and reducing the overall cost of change. Making Colligo an integral part of your overall digital workplace strategy will have an immediate impact on the cost, speed, and success of your digital workplace transformation.

## Creating Digital Workplace Heroes

For many organizations, the time and cost it takes to transform their business processes is as much of a concern as the decision itself. Any enterprise-wide change will present challenges, but Colligo can help you dramatically ease the transformation, helping your organization to quickly adopt, adapt, and be productive.

Colligo's evaluation and implementation tools are available to guide you, and their team of SharePoint experts are available to share ideas, approaches, and successes. Learn more at [www.colligo.com](http://www.colligo.com)







## About Colligo

With 10 years of SharePoint-centric expertise, Colligo is a leading provider of collaborative apps for the digital workplace, extending Microsoft SharePoint, Office 365, and OneDrive for Business with a focus on achieving 100 percent user adoption. Our software enable workers with easy, anytime access to content stored on these enterprise information systems, regardless of device or connectivity, while giving non-IT administrators clear visibility to auditable user adoption metrics.

The Colligo Engage platform consists of a set of native apps—Colligo Briefcase and Colligo Email Manager—built with user experience in mind. All of our apps use caching for seamless performance, and our client-side synch technology eliminates the need for intermediate servers, dramatically reducing the risk to your data. Our cloud-based administrator tool, Colligo Console, enables non-IT users to harness the power of central SharePoint configuration without the complexity.

Colligo is a Microsoft Gold-certified partner, and a member of the SharePoint Partner Advisory Council. We're proud to count some of the largest organizations in the world amongst our customer base, including multiple Fortune 500 companies, several US federal government agencies, and four of the top five global oil and gas companies.



For more information, or to request a consultative call, please visit [www.colligo.com](http://www.colligo.com).

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