

How a
**Leading Public Private
Management Utilized
Document Management
system for a cost-effective
email management solution**



INTRODUCTION

One of the leading public-private partnership companies in the finance industry continuously seeks innovative solutions to streamline operations. With the growing business, the company demanded a robust email management solution that optimizes communication and collaboration.

The company understands the pivotal role of the contracts and financial documents received through email. So, they wanted an email management tool that could streamline the whole process from importing the emails to a centralized repository to saving their metadata and customizing it all according to the business need.

However, after doing market research it was becoming challenging for the company to find a customized email management solution or records management that could be seamlessly integrated within their M365 subscription and save them bucks. . But Titan Workspace the leading finance company was able to solve these challenges. Using Titan Workspace's document management system, they customized their email management tool within M365 in a cost-effective manner without involving any technical team and spending more time.

WHAT IS EMAIL MANAGEMENT TOOL?

An email management tool or record management acts as a smart assistant that integrates with your existing email. It offers features to streamline communication and boost productivity. The email management tool helps in organizing emails, prioritizes important messages and facilitates team collaboration through shared inboxes. By taking care of the little things, an email management tool helps you stay organized, respond promptly to critical emails, and focus on the most important work and interactions.



WHAT IS META DATA IN EMAIL?

All the additional information or details that are attached to an email message, beyond the main content or body of the email itself is call Meta Data. In easier language we can say that it includes things like the title or subject of the email, as well as data that describes or provides context about the email. Metadata is like the outer packaging or labels on an email that give you important details about it, such as the subject line, without having to open the actual message.

Challenges faced by the company in the finance industry



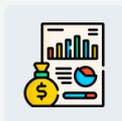
Inbox Information Overload :

Multiple emails related to contracts and financial documents flooded the inbox daily, leading to information overload.



Prolonged Search Times :

Prolonged search times hampered overall productivity and caused frustration among employees.



Financial Challenge :

Existing email management tools in the market demanded a significant budget, posing a financial challenge.



Integration :

The company needed a solution that can be easily integrated within their existing M365 subscription leveraging the SharePoint features.

How Titan Workspace Solved the Problem?

Titan Workspace utilized its document management system to solve the challenges faced by the leading public-private partnerships company. The solution implemented includes the below-mentioned points:

1

INTEGRATION WITH DOCUMENT MANAGEMENT SYSTEM

Titan Workspace integrated its Document Management System (DMS) into the Company's existing M365 environment, serving as an email management solution 1. or we can also say record management solution.

2

CUSTOMIZATION FOR EFFICIENT IMPORT

The **DMS** was customized to directly import files from Outlook, simplifying the process of saving emails and attachments to the centralized repository.

3

METADATA ADDITION

Metadata such as subject, summary, and title were added to emails and attachments, enhancing searchability and organization within the DMS.

4

EASE OF METADATA SETUP

Titan Workspace architecture enabled setting up metadata at the time of importation, streamlining the workflow.



CONCLUSION

Titan Workspace's document management system turned out to be the ideal email manager for the leading company in the finance industry. Streaming email retrieval, centralized email storage, and improved usability made the solution a huge productivity and efficiency booster for the company. **Titan Workspace** exceeded the finance company's expectations by providing a customized solution that was affordable, user-friendly, and seamlessly integrated with the existing infrastructure. As a result, it set a new standard for email management services in the finance sector.

