

# International Higher Education Organisation Case Study - Digital Transformation and Efficiency

## Introduction

This sample report summarises a scoping exercise to review a membership organisation's operational processes and identify improvements by leveraging existing Microsoft 365 infrastructure and subscriptions. The work included an introductory session on core Microsoft tools, practical demonstrations, and tailored recommendations. Company Name has been redacted as "company" and any identifying or confidential information removed.

## Key metrics

Consolidating into SharePoint/Teams created a single source of truth: file find time ↓ 35-60%, duplicates ↓ 60-80%. Standardised meetings/events and automated onboarding cut email ↓ 20-40%, event cycle ↓ 30-50%, onboarding steps 4-6 → ≤1; finance tracking saves 30-50% reconciliation time, boosts on-time delivery +10-20pp, and tightens governance with zero uncontrolled external shares.



**70+**  
processes improved



**200K**  
hours saved/year



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## APPROACH

We took a pragmatic approach to quickly address the main painpoints of the organisation and implement an action plan.



Document



Determine



Build

## PROCESS

1

### Document Migration and Folder Structure

Migrated all organisational documents from Dropbox to SharePoint, with clear rules for archival and structuring within Microsoft Teams.

2

### Structuring Teams for Meetings

Defined where and how different types of meetings are hosted within Teams to support recurring engagement and segmented access.

3

### Implementing Wider Tools

Standardised the organisation's use of Microsoft 365 wider tools—Planner, Lists, Power Automate, Power BI and advanced Teams features—to provide shared visibility of work, automate routine steps, and establish lightweight reporting, while maintaining clear governance and controlling cost.



## Challenges

# What we found

01

### Fragmented toolset & duplicated work

Dropbox, Zoom, Eventbrite/Cvent, SurveyMonkey, HubSpot, Invoicely, and spreadsheets were used in parallel, leading to duplicate data entry, multiple versions of the truth, and frequent manual reconciliation.

02

### Document sprawl & weak information governance

Files were scattered across Dropbox and personal folders, with inconsistent naming, no standard folder taxonomy, and manual versioning. Finding the “right” file was slow and error-prone.

03

### Inefficient meetings & mixed permissions

Board/Directorate meetings ran via Zoom/email threads with recordings and notes stored separately. External directors sometimes mixed with internal spaces, increasing risk and confusion over who can see what

04

### Manual membership workflows

JiscMail changes and new-member onboarding were handled informally via email, with attachments and one-off messages instead of templated, trackable steps.

05

### Events & webinars stitched together

Registration (Eventbrite/Forms), delivery (Zoom/Teams), surveys (SurveyMonkey), and collateral (Dropbox/Craft) lived in different systems, creating rekeying, missed follow-ups, and scattered records.

06

### Underuse of existing Microsoft 365 entitlements

Teams, SharePoint, Planner, Lists, and Power Automate were available but not systematically adopted, leaving behind easy gains in collaboration and automation.

**Root causes:** No agreed information architecture (IA) or ownership model; legacy habits around email and file storage; unclear permissions model for external collaborators; and limited training on modern M365 workflows.

# What we determined



Category	Workflow	Current Process	Current Tool	Microsoft Replacement	Details/Considerations	Implementation
Membership Management	Mailbase sync requests	Requests for JiscMail	Manual via Email	Microsoft Forms +	Submit requests via	Complex to implement,
Membership Management	Email onboarding	Staff manually	Manual emails	Outlook templates or	Send welcome	Quick Win, potentially
Finance & Invoicing	Invoicing and Payment	Invoices created and	Invoicely + Dropbox	Replicate system in	Would take manual work	<a href="#">Excel</a> solution is
Finance & Invoicing	Payment receipts	Bank Transfer,	Dropbox + Excel	Sharepoint/Teams for	If using Lists, files can be	Quick Win
Training Events &	Event setup	Event setup handled via	Eventbrite/Manual	Microsoft Forms /	Use Forms for internal	More Complex to
Training Events &	Attendee tracking	Sign-ups tracked in	Excel (local/Dropbox)	Excel on SharePoint or	Real-time co-authoring	Quick Win
Training Events &	Promotion emails	Hubspot used to create and	Hubspot	Outlook templates	Replace Hubspot with	Quick Win – but would
Training Events &	Post-event surveys	SurveyMonkey used to	SurveyMonkey	Microsoft Forms	Collect feedback	Quick Win
Training Events &	Recording management	Recordings stored in	Dropbox	Teams + SharePoint	Store recordings	Quick Win
Training Events &	Slide sharing	Slides stored in Dropbox;	Dropbox/Craft	SharePoint / Craft Embed	Link to slides from	Quick Win
Document & Files Hub	Shared storage	Files saved in Dropbox by	Dropbox	SharePoint + Teams	Organise templates,	Quick Win
Document & Knowledge	Version control	Older file versions	Manual file versions	SharePoint versioning	Avoid duplicates via	Quick Win
Meetings: Exec &	Meeting scheduling	Meetings arranged via	Zoom + Email	Stick with Microsoft,	Standard recurring	More Complex to
Meetings: Exec &	Recordings & notes	Zoom recordings	Dropbox	Teams + SharePoint	Auto-store recordings	Quick Win
Meetings: Exec &	Collaborative notes	Word documents	Word/Dropbox	Word Online	Live-editing shared via	Quick Win
Surveys & Sector	Survey creation	SurveyMonkey used with	SurveyMonkey	Microsoft Forms	Use Forms with	Quick Win
Project Management	Shared to-do lists	Task lists kept in Google	WhatsApp/Sheets	Microsoft Planner	Use Planner within Teams	Quick Win
Project Management	Project templates	Tasks copied manually for	Manual	Planner Templates	Reuse for campaigns/ev	Quick Win
Project Management	Internal comms	Team messages	Email/WhatsApp	Teams Channels or	Channels or Folders for	Quick Win
Project Management	Status dashboards	Status tracked in	Manual	SharePoint Site Page or	Custom dashboards	Quick Win - Planner or an



# What we delivered



## Single Point of Truth

Single information architecture agreed and provisioned in Teams/SharePoint ("company Operations").



## Defined Process Policy

Archive policy defined and implemented, enabling safe migration from Dropbox with clear Keep/Archive/Delete rules.



## Process Prototype

Pilot workspace created with Planner and Lists examples to model tasks and lightweight automations.



## Training

Intro training delivered on core Microsoft tools; quick-start guides linked in Teams Notes for self-serve learning.



## Validation & Testing

Tested and re-tested processes and enhanced where validation did not meet requirements.



## Interactive Review Process

Established an interactive review process every quarter to adapt to new changes in process and technology







# What we achieved



## Better Structure

File find time reduced by 35–60% via a standard SharePoint structure and search.



## Version Control

Duplicate files reduced by 60–80% using version history and single-source storage.



## Ops Streamline

Email volume for document exchange/scheduling reduced by 20–40%, replaced by links and Teams meetings.



## Meeting capture

100% of Board/Directorate sessions recorded (where appropriate) with notes stored alongside the meeting in Teams.



## Onboarding automation

New-member welcome packs sent automatically; manual steps per joiner reduced from 4–6 emails to 0–1.



## Events efficiency

Events workflow time from registration → delivery → survey cut by 30–50% by consolidating on Teams Webinar + Forms and storing artefacts in SharePoint.

