



## Case Study



## Transforming Policy Management and Compliance with Microsoft 365

### Our Client

**Greg Ackerman**  
President & CTO

### Profile

Location: California, USA  
Size: Mid-size Enterprise  
Sector: Healthcare & Diagnostics

### Focus Areas

Policy Management  
Regulatory Compliance  
Workflow Automation

### Technology

Policy Express

**Policy Express helps organisations like Precision Diagnostics in healthcare build automated, audit-ready policy management within Microsoft 365 – without the enterprise price tag.**

Precision Diagnostics LLC needed to replace an outdated policy management system that was becoming a compliance risk. Moving to Policy Express inside Microsoft 365 allowed them to automate critical workflows and eliminate manual effort.

## Meet the Client

Precision Diagnostics is a healthcare laboratory based in San Diego with more than 500 employees. Operating in a tightly regulated environment, they depend on clear, controlled policies to ensure their processes remain consistent and auditable.

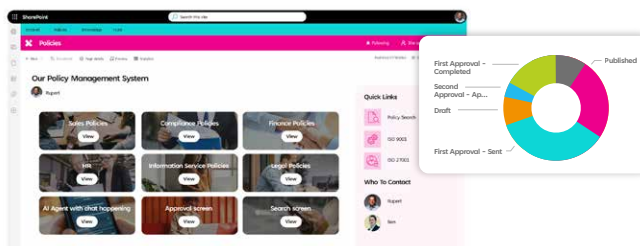
## The Challenges

Rapid growth had left them with what Ackerman describes as **"a mess of systems"** and an ageing policy management tool that no longer fitted their Microsoft 365-first strategy.

As he explains, **"we had zeroed in very quickly on Microsoft 365 and decided we would use those tools whenever possible. However, the incumbent system didn't have the ability to assemble the tools as elegantly as Information EXP did"**, meaning policy ownership, reminders and user management still relied on manual effort.



"Work that used to take 20 to 30 minutes daily is now fully automated."





Policy Express is a “game-changer” as “approvals, reminders and publishing all happen without relying on people remembering.”

## The Solution

Information EXP implemented Policy Express in around four months. Ackerman notes that much of this time was spent improving policy consistency, turning the project into both a content clean-up and a technology upgrade.

Because Policy Express is built on SharePoint and the Power Platform, it fitted naturally into how staff already worked, reducing the need for retraining.

## The Outcome

A key highlight was the automated orphaned-policy alert, which he says “justified the entire investment” on its own.

“Work that used to take 20 to 30 minutes daily is now fully automated.”

Managers now use Power BI dashboards to monitor compliance without chasing people, and the costly, cumbersome incumbent system has been fully retired.

### Key takeaways

Policy Express did far more than digitise documents. It removed an invisible, full-time management workload.

Ackerman reflects: “If I could do it again, I’d start by mapping out exactly what those workers would do post-automation,” after seeing how much manual updating Policy Express eliminated.

Precision Diagnostics now see policy management as part of their wider Microsoft 365 journey. Ackerman adds: “We’re now exploring how their AI offering can further improve our Policy Hub, making it even more intuitive and effective.”

