

Tiger Eye case study: Legat Owen

Customising the DMS for Chartered Surveyors

It's a job, not a matter.



Challenge

Like many firms, the business has seen a radical change in the way day-to-day business is carried out.

When Peter Owen started Legat Owen, business communications revolved around letter and the phone, and every job's associated paperwork was physically stored in a filing cabinet. As email became the "new" manner in which to communicate with clients and other parties, it became more difficult to get a complete and full picture of each job. As emails were stored on individual PCs, finding the latest details of a particular job meant hunting through Outlook. Worse still, if someone was away or had left the business, it made this task much more difficult.

In Peter's words, "We were bogged down by emails."

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Legat Owen had a wealth of accumulated knowledge that was a valuable but underused asset. For instance, they had an unmatched library of surveys, rent reviews, lease renewals, ratings and valuations. The value of this information could only be realized if staff could get to it easily and quickly.

Peter knew he needed an IT system that would open up this value, "I spent quite a lot of time looking at document management systems. We had some trials, but the products didn't seem to work so well. The iManage DMS immediately delivered benefits to the firm, especially around business processes."

The iManage DMS is now regarded as a critical business asset.

The firm needed a trusted, experienced and reliable iManage partner to support the system.

Challenges

- Too many files stored in **paper** form
- Difficulty tracing email chains and managing communications surrounding jobs
- Business information not stored centrally

Solution

- Custom solution adapted to Chartered Surveyor work practices
- Deployed iManage Work to **streamline** digital assets
- iManage enables all staff to search and retrieve from files

Results

- All information and correspondence available to staff easily
- Staff can work both in the office and out
- Business **easier to audit** in line with regulations

Background: Legat Owen CS

Legat Owen Chartered Surveyors are a North West based commercial property consultancy who have an enviable customer base that spans the UK.

From its beginnings in 1986, Peter Owen and his team have built up the business to offer advice across a whole spectrum of commercial property that includes retail, industrial premises, offices, leisure and land.



The iManage Document Management System

Having a reliable email and document management system is vital for a business like Legat Owen.

A key benefit of the solution is that now, with the system in place, the wealth of information in the business is now available to all staff, and within just a few moments. This has turned an underused asset collection into real competitive advantage for Legat Owen.



To find out more about how Data Management can help your business, contact Tiger Eye:

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Solution

Peter then evaluated iManage Work and immediately saw the benefits and possibilities that the technology could deliver for the business.

Tiger eye were recommended to Peter and he found the attitude and approach that he was looking for.

In Peter's words, "Commercial property as the central subject was new to Tiger Eye but they really took the time to listen to our brief and look at our existing work practices."

It was important to consider the electronic file design and its associated content; Tiger Eye liaised extensively with all staff at Legat Owen to ensure that all ideas and points of view were captured and considered. Tiger Eye also took time to customise the DMS to take into account the variations in ways that addresses can be written and referred to: a key consideration for chartered surveyors dealing with plots of land and units within buildings.

As Peter recalls, "This took some time, but Tiger Eye persisted until it was completed to precisely suit our needs."

Results

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A key benefit of the solution is that now, with the system in place, the wealth of information in the business is now available to all staff, and within just a few moments.

Peter Owen says, "Instead of information being solely referenced within, say, our industrial department or in retail, we now all have access to it across the whole firm."

This has turned an underused asset collection into real commercial advantage for Legat Owen.

Peter also points out that as regulations grow ever more complex, there are other advantages to having a DMS. "From a regulation point of view, if our processes are audited, we now have a filing and reference system which is comprehensive, effective and totally systemized. That helps a lot!"

Legat Owen knows that whilst results from a project like this are often difficult to quantify, they see a significant difference to the way the company now operates.

"We have always tried to stay ahead of the game and invest in IT. I think we have a real competitive advantage," said Peter.

"We now have a real competitive advantage"

Peter Owen
Founding Director
Legat Owen

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partners for over ten years