

Invu:

Robert Oulsnam

Reduced printing costs & immediate access to records

Robert Oulsnam needed direct access to documentation, Invu Document Management was the answer.



"We've made a return on investment in just over 3 months - we anticipate efficiency savings trebling the ROI within a year"

Robert Oulsnam

Document Management
- Integration with CFP -



Founded in 1971, Robert Oulsnam & Company, is the Midlands' leading estate agent, specialising in the sale and letting of homes in Birmingham and North Worcestershire.

The Challenge

With 50 members of staff distributed across a network of ten offices, the business has specialist departments for survey, valuation, auction, mortgages, conveyancing, retirement homes and land for development. With the advent of Home Information Packs, the vast amount of paperwork that was generated began to suppress the growth of the business and a solution was urgently required.

In 2008, the Managing Partner, Andrew Oulsnam successfully expanded the lettings side of the business at the Barnt Green office, taking on eight extra members of staff. In parallel came the expected but still dramatic increase in paperwork.

Kerry Parker, Lettings Manager at Robert Oulsnam & Co explained, *"The sheer scale of paperwork from the increased business was overwhelming. We needed direct access to the documentation but found ourselves with ten filing cabinets, overflowing with paperwork and putting a strain on our client service. We didn't have anywhere else to store the documentation and off site storage costs were prohibitive. Electronic document management was the answer."*

"We are very pleased with Invu. The extra time saved enables us to work more efficiently and generate new business to grow the company."

Andrew Oulsnam,
Managing Director

Solution Summary

- ▶ Quick return on investment
- ▶ Immediate access to records
- ▶ Reduced printing costs
- ▶ Efficiency savings
- ▶ Enhanced client service



Proud to partner with:



Developer



The Approach

Invu was recommended by a colleague. Andrew explained, "Previous quotes I had received for an eDM system were over budget. Invu was easy to use, offered the same if not more features than the other systems and was within budget. It was also scalable to our needs and integrated with our CFP software."

The business purchased ten licences of Invu Document Management in addition to Invu Link to integrate with CFP Residential Lettings & Property Management software, Oulsnam's line of business application.

A Single Source of Information

Oulsnam's now stores all its letting documents in Invu. These include confirmation of instruction documents, valuation reports, gas certificates, tenancy agreements and post management questionnaires.

"When we move a tenant into a property all the paperwork is scanned in. There is no need to spend time filing as we have every document we need at our fingertips. This also includes emails which amount to 300 a day."

Business Efficiencies

The lettings agency operates more efficiently with Invu. Documents are quickly stored within Invu removing the time required to file documents and time to find misfiled documents. Kerry explained, "Before Invu we would all spend three to four hours a week filing or looking for documents. With ten staff in the office this equates to 2,000 hours of wasted time a year - a full time member of staff. Now it takes seconds to find the documents we need, particularly with the integration to CFP, or actioned and filed straight into Invu."

"We are very pleased with Invu. The extra time saved enables us to work more efficiently and generate new business to grow the company."

Reduced Business

By storing documents within Invu, Oulsnam's no longer needs to print documents or emails to client files. This has resulted in a 50% reduction in paper for printing and a reduction in printer toner. Kerry continued, "Previously we would print all correspondence and emails so that we could keep a copy on the client file. This is not necessary with Invu and as a result we have reduced our stationery costs by 50%"

Business Growth

Within six months, the Invu system has enabled the business to work more efficiently and reduced business expenditure. Removing most of the filing cabinets means more space for new staff as part of the company's expansion. Invu also means enhanced customer service to clients and establishes a clear advantage over competitors that still use manual files.

Andrew Oulsnam explains, "Invu has swiftly become a key part of our lettings department. The reduction in time and cost savings have enabled us to grow our business within a short period of time. We are now looking to roll out Invu within our estate agency also."

About Invu:

Invu develops both Electronic Document Management (eDM) and Accounts Payable (AP) software solutions for a range of sectors, particularly those which are highly document dependent or where compliance is important. Invu's comprehensive product suite encompasses document and content management, workflow, document automation and collaboration solutions.

INVU: