

Case Study

Property:
Robert Oulsnam & Company



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. 50 members of staff are 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.

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

Andrew Oulsnam, Managing Partner
Robert Oulsnam & Company



The Problem

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. "We knew that by expanding the business we had to improve our records management. Our staff needed direct access to all documentation and electronic document management was something we had looked at before but the cost was prohibitive."

Kerry Parker, Lettings Manager at 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."

The Solution

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."

In August 2008, 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.

Integrates with:



“The expansion of the business has caused major administrative difficulties. Invu resolves these as well as providing time and cost savings.”

Andrew Oulsnam, Managing Partner, Robert Oulsnam & Company

The Benefits

A single source of information

Oulsnams now stores all its letting documents in Invu. Since October 2009 this equates to 13,000 documents. These include confirmation of instruction documents, valuation reports, gas certificates, tenancy agreements and post management questionnaires.

Kerry Parker, Lettings Manager explained the process. “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 2000 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.”

Reduced business expenditure

By storing documents within Invu, Oulsnams 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.

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

The Future

Andrew Oulsnam explains, “Invu eDM 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 software that incorporates document management, content management, workflow, automation and collaboration specialising in solutions for the mid-market and smaller businesses.

Also known as the paperless office, Invu typically gives a return on investment in under six months, allowing companies to see efficiency savings in terms of both money and time.

Invu's Open Search integration allows SharePoint users to fully utilise the benefits of WSS or MOSS whilst retaining the functions of specialist document and content management.

Invu's solutions enable automated scan, capture and management, processing and output transformation.

Invu also integrates with all major accounting systems including Sage and IRIS, as well as ERP and CRM systems.

Robert Oulsnam & Company implemented their Invu software with Invu reseller Balreed Digitec. Contact Invu for more details.