

CASE STUDY

Gresham Private Equity



A Single Virtual Office: iManage WorkSite Streamlines the Deal Process at Gresham

Gresham were looking to develop a common deal process across all of their offices. The requirement was to streamline the business, boost efficiency and facilitate collaboration. In his search for the right solution, IT Manager Dave Rogers turned to industry colleagues who recommended iManage WorkSite and Phoenix Business Solutions. iManage WorkSite interfaces with Outlook, MS Office and Gresham's deal management system, which facilitates a consistent managed deal process. iManage WorkSite implemented by Phoenix was the obvious choice due to a level of understanding of the business and the capability to provide the necessary integrations.

Gresham is an independent private equity house with offices in London, Manchester and Birmingham. Its portfolio covers a broad range of investments throughout the UK.

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Each office had developed its own methodology for organising the documentation associated with the deal process. 'Cross-office teams work on several deals simultaneously, so a London partner working on a Manchester-led deal would be working with documents that were organised in an unfamiliar way' explains Rogers. Furthermore, the network folders for each deal did not include e-mails. This led to problems including duplication and access. Everyone party to an e-mail exchange would retain copies of documents and colleagues could not access each other's e-mail. There were also variations in style and formatting.

Why Phoenix?

- Leading provider of software solutions and IT consultancy for Professional Services Firms
- Autonomy iManage Platinum and Development Partner
- A team of experienced and highly qualified professionals

Why Autonomy iManage?

- Market leading document and email management system
- Full auditability of all related documents and emails
- Powerful search capabilities

"WorkSite has transformed Gresham into a single virtual office, boosting consistency, productivity and client service."

**Dave Rogers, IT Manager,
Gresham LLP**

iManage WorkSite Delivers a Consistent Deal Process

Rogers decided to introduce a common system across all three offices. 'We were looking to achieve consistency and generate common procedures and templates' he explains.

To this end, partners in each office agreed on a set of folders that would be created automatically for every deal logged on Gresham's deal management system. A pilot group was trained then switched over to iManage WorkSite allowing Phoenix to identify and resolve any teething difficulties before the system was rolled out. Thousands of documents and e-mails in Gresham's portfolio were then transferred to the new system.

As WorkSite involved changing core working practices, effective training was a critical success factor. 'Due to integration with industry standard systems including Outlook and MS Office, the system provides a familiar interface for users. Phoenix provided comprehensive on-site training at each regional office covering the core features and highlighting the business benefits of the new system' says Rogers.

The new system includes the ability to track the progress of a deal, referred against data entered in Gresham's deal management system. When a deal folder is opened, sub-folders are automatically generated. Folder headings automatically indicate the stage reached in the deal process. E-mails are filed in the relevant folders and easily accessible. At the investment stage Gresham also utilise pdfDocs, which is another product supplied by Phoenix. pdfDocs enables users to collate all the documents together as a single PDF for ease of review, this also reduces the need for printing. Common templates make it easier to create and identify key documentation, including e-mails, multiple versions and creates a consistent look and feel. Automated processes reduce routine administrative work for partners and their PAs.

A Single Virtual Office

According to Rogers, 'WorkSite and Phoenix have transformed Gresham into a single virtual office, boosting consistency, productivity and client service.'