

Case Study





Drivers Jonas Automates Global Electronic Information Retrieval and Improves Collaboration with Interwoven

Like most property consultancy and management firms, industry leader Drivers Jonas works with an enormous volume of content in the course of its business, which includes services ranging from investment, development, and construction consultancy to property management. Some projects last ten years or more and involve hundreds of properties that the firm's consultants must manage, including all legal documents, leases, drawings, photographs, memoranda, and more.

As they pass these documents among co-workers, clients, tenants, contractors, and business partners, they must maintain a complete audit trail and protect information against loss. Although Drivers Jonas was addressing these requirements as well as any of its competitors, its existing environment of highly complex drive-based folder systems, e-mail, and paper-based documentation and images posed increasing barriers to productivity and collaboration. A next-generation solution was clearly needed.

“Our job-centric WorkSite system makes it easy for individuals in business units and locations throughout Europe to find and work with documents and collaborate as a unified team. This significantly improves the efficiency of our firm.”

Alan Lattimer, Drivers Jonas COO

To help its professionals achieve better productivity while reducing risk, Drivers Jonas needed to improve its users' ability to search, manage, and share content, especially across multiple offices, and institute a more consistent and intuitive approach to filing content. E-mail management was also critical to capture client communications and retain a full audit trail. More broadly, Drivers Jonas needed a system that could simplify work processes firm-wide while allowing the flexibility to adapt to the specific requirements of different groups.

Bringing Job-centric Document Management to the Property Industry

Interwoven, Drivers Jonas's document management provider of choice, had a long track record of success in professional services fields such as law, accounting, and consulting, but it was a relative newcomer to the real estate industry. To design and support an Interwoven WorkSite implementation adapted to its specific needs, the firm turned to Interwoven partner Phoenix Business Solutions, a leading provider of software solutions and IT consultancy for professional services firms. “Phoenix had done good work in the legal field, and their experience in the real estate space was as good as anyone else's,” explains Drivers Jonas COO Alan Lattimer. “Their clear determination to expand their involvement in the field was another strong point in their favor.”

Drivers Jonas's requirements were influenced by an earlier document management implementation, which had mapped its structure to the firm's existing file system. “Our previous approach made documents too difficult and time-consuming to find,” says Lattimer. “We wanted to be able to store and access all project-related documents, e-mails, correspondence, images, and other content within a single job-related file, so consultants throughout the firm could find and collaborate around content more intuitively.” While this job-centric approach was new for the real estate industry, it was a natural extension of the matter-centric model pioneered by Interwoven for the legal industry.

Industry

Real estate

Challenges

- Deep file server folder structures and content silos made information hard to find and hampered collaboration
- High volume of e-mail posed risk of lost or misfiled information and regulatory non-compliance
- Version control was needed for documents being handled across multiple parties, as well as the handling of complex documents such as CAD drawings and photographs

Benefits of Using Interwoven:

- Easy to find and retrieve content of all types, including e-mail, within unified job-centric files
- Integrated e-mail management eases overload and captures crucial job-related communications
- Efficient collaboration around content for users throughout the firm and across Europe
- Reduced business risk with complete audit trails and simplified backup



Solution

Interwoven WorkSite powers job-centric collaboration for Drivers Jonas. Interwoven WorkSite provides integrated document management and e-mail management within a single environment, making it easy for the firm's professionals to manage, store, and collaborate efficiently around complete job-related content across locations and business units. Customised tools developed by Interwoven partner Phoenix Business Solutions further tailor the system to the requirements of the real estate industry.

Improving Productivity While Reducing Risk

Working closely with Phoenix and Interwoven, Drivers Jonas completed a WorkSite implementation that included a rollout to 600 users across the UK and Europe and the migration of 4.5 million documents into the Interwoven repository. Now, when a new job is initiated within the firm's time recording and billing system, a job-centric Workspace is automatically generated within WorkSite and populated with a folder structure appropriate to the type of project. "It's a very quick process," reports Lattimer. The use of 25 Workspace templates provides the ideal balance of standardisation and flexibility; users in any location can intuitively navigate WorkSpaces firm-wide, while individual work groups benefit from WorkSpaces tailored to their needs.

WorkSite's robust core document management capabilities have been extended by Phoenix to meet Drivers Jonas's specific requirements. To handle the large volume of photographs that come into the firm, Phoenix replaced the multiple applications previously used with a single importer that enabled thousands of photos at a time to be captured into WorkSite, assigning a unique reference ID to each according to the set to which it belongs. For e-mail management, Outlook's "Send" button was replaced with "Send and File" to file e-mails automatically within the appropriate Workspace. Received e-mails can be either filed automatically or manually. In either case, a job number tag ensures accurate filing. "Phoenix has done good work for us," says Lattimer. "They've understood how important it is to get things right, and they've been diligent in understanding and responding to the unique needs of our firm and our industry."

With a standard document management system that can be accessed from any location, Driver Jonas has greatly improved both individual productivity and internal collaboration. Existing content is easier to find and re-use, improving knowledge management and eliminating the need for users to create contracts and other documents from scratch. Business risk has also been reduced: "I sleep much better knowing that we can capture and maintain complete audit trails for a full fourteen-year term, which some parts of our business require, without worrying about drives failing or PST files being lost," says Lattimer.

Extending a Successful Collaboration

Drivers Jonas continues to set a new standard for the efficient and productive use of document management within the real estate industry. "We operate fourteen businesses through ten locations," says Lattimer. "Our job-centric WorkSite system makes it easy for individuals in business units and locations throughout the UK and Europe to find and work with documents and collaborate as a unified team. This significantly improves the efficiency of our firm."

About Interwoven

Interwoven is a global leader in content management solutions. Interwoven's software and services enable organisations to effectively leverage content to drive business growth by improving the customer experience, increasing collaboration, and streamlining business processes in dynamic environments. Our unique approach combines user-friendly simplicity with robust IT performance and scalability to unlock the value of content. Some of the most recognised enterprise and professional services organisations worldwide have chosen Interwoven, including: adidas, Airbus, Avaya, Cisco, DLA Piper, the Federal Reserve Bank, FedEx, HSBC, LexisNexis, Microsoft, Samsung, Shell, Samsonite, White & Case, and Yamaha. Over 20,000 developers and over 300 partners enrich and extend Interwoven's offerings. To learn more about Interwoven, please visit www.interwoven.com.

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