

Carter Jonas

Managing Information for Success with Phoenix Business Solutions

Carter Jonas describes how Phoenix's document management solution has transformed the accessibility and management of information around the business, enabling teams and locations to work collaboratively and productively from any office, remotely or on the go.

Talking the right language

With over 700 property experts and personnel, Carter Jonas is one of the UK's largest firms of property consultants, providing a full range of integrated property services via its extensive UK office network. Over the last three years, the organisation has experienced a period of unprecedented growth, which has seen it add new business lines and expand its geographical reach, culminating in the launch of a Birmingham office in September 2016.

Having identified early in its business planning that technology, systems and processes were crucial to its success, Carter Jonas knew that a fast, effective and scalable document management solution (DMS) was required to meet the ever increasing information management demands across the business.

The business required an agile and flexible solution that was robust enough to meet both the needs of the business in driving productive working practices, as well as adhering to the high standards of governance and compliance demanded in this sector, and looked to the consultancy expertise of Phoenix Business Solutions. Phoenix not only offered the technology, enterprise search and document management capabilities required, they also spoke the language of professional services. Understanding not just how property companies work, but also taking time to get to grips with how Carter Jonas operates, laid the foundations for success.

Business continuity, collaboration between dispersed teams and safeguarding Carter Jonas information assets were top-level

objectives. Drilling down, that meant resolving several practical problems including:

- ✓ Lack of a uniform policy for storing electronic information meant all staff saved information differently using various file structures on local office servers.
- ✓ Constant sharing and collaboration as part of daily activities made it hard to ensure that one version of the same document existed. With photos, plans and often duplicate files held at local offices, emailing between offices or making copies was the norm.
- ✓ Staff often reverted to taking physical files to client sites, relying on administrators to retrieve all relevant project files and produce printed copies.
- ✓ Email transactions relating to project work were invariably saved in individual mailboxes with no relation to data stored on local servers which caused difficulties when staff members were unavailable or left the firm.

Carter Jonas needed to electronically file all content relating to each property including documents, emails, photos, plans etc. for each lease transaction. Access was required not only from a desktop but also via mobiles, tablets or other internet connection so that staff could effectively work anywhere but still maintain security and compliance standards.

Creating a vision for the future

It was important to kick off the project with the right approach; for Carter Jonas that meant complete buy-in across the business. IT Director, Tim Spencer explains further. "We didn't want this to be seen only as an IT project. The application sponsor was the Chairman and it was presented as a business-wide project with Phoenix playing a key part from the beginning."

Phoenix brought in the entire Carter Jonas project team for a kick-off meeting to make clear what was required, who would need to be involved and how long the process would take. Managing expectations from the start and identifying the risks – particularly regarding the data migration phase – were important steps to ensure issues didn't arise later.

Throughout the scoping and design phase Phoenix engaged with the different areas of Carter Jonas through workshops, thus enabling staff to feed into the final design of the solution. Tim Spencer highlight the importance of this step. "Culturally this was a big change as staff were moving from a reliance on hard copies and their own folders to a far more structured approach."

One of the key reasons why Carter Jonas chose Phoenix was because they wanted a customised, integrated solution, not an 'out of the box' installation. Although top level design principles were agreed, a level of flexibility in what users could do was also accommodated, which proved popular with individual departments with very specific working practices.

A fully integrated, best-of-breed solution

The solution Phoenix built for Carter Jonas utilised iManage Work enhanced with Phoenix software to enable ease of integration with the firm's property management system. This created a robust and scalable document and email management platform that works seamlessly with Microsoft Office and the firm's IT infrastructure.

The DMS supports the integrated management of all office electronic documents relating to clients, jobs and opportunities including WP, email, spreadsheets, presentations, photos etc. Additional document types can be added as required. The system enables storage, retrieval and viewing of files in their native format without the need to have the applications that generated the file initially.

All components of the solution are scalable and able to support different offices experiencing varying degrees of available bandwidth and connectivity. And where staff members from other

teams need to collaborate, they can still access the DMS as part of an extended team without the need for a desktop installation.

Tim Spencer is delighted: "We now have much more powerful search and retrieval across multiple platforms which makes a big difference for our fee earners, especially when they are on site. The days when they drove around with 10 files in the boot of the car are long gone."

"We've been able to further enhance our security and data protection policies, so for example we now send links to documents, not attachments. Only those who need a document have visibility thanks to our tightened access control protocols. Another added benefit is that we have a full audit trail and can now see who has printed or previewed a file which gives further assurances about our approach to governance and compliance status. We've even reduced our print costs and environmental impact as everything is filed electronically."

Delivering change

A key part of the solution is how it integrates into Carter Jonas' existing systems for information flow and reduced clicks: it's seamless for users with no need to rekey data. But no matter how fine-tuned the solution is, the migration from old to new needed to be handled carefully as Tim Spencer explains. "Phoenix was extremely experienced in process management and delivery. They were key to the design of our solution and their consultants were clearly very experienced and helped to engage our stakeholders from the beginning. I think Phoenix managed post implementation and milestone support particularly well too. Once you have migrated data in you need to be agile enough to fix the inevitable issues in a timely fashion. Our end-users didn't feel any pain or become aggrieved which was important."

But the biggest challenge was getting people to change the way they work. This became easier once individual users could experience first-hand how intuitive their custom-built solution was. The fact that it is all accessible via familiar applications helped, as well as the support available. Tim Spencer agrees. "Some offices were more concerned about the change than others, so training

and floor-walking were essential, especially where we were low on resource. We used a combination of Phoenix trainers and our own and this worked really well."

Tim Spencer sums up some of the reasons why this ongoing partnership continues to be a positive and productive one. "For me, Phoenix does several things really well. They bring to bear extensive experience of the products; they roll out best practice in a fluid manner; and they're also agile and flexible with change requests."

The solution designed and deployed by Phoenix has enabled Carter Jonas to benefit from improved accessibility to streamlined and synchronised content, which has delivered more effective, collaborative and productive working practices, whilst providing the firm with greater control. This has resulted in considerable time savings and a reduction in operating costs across the business.

"I'd definitely recommend Phoenix to others," Tim concludes.

About Phoenix

Phoenix Business Solutions is an information, content and document management specialist, providing strategic consultancy, software solutions and system integration for companies across the legal and professional services markets, globally since 2003.

