

A Lindenhouse Case Study

Bartlett Life & Pensions Limited
Bartlett Group Limited, Leeds



Bartlett

Established in 1940, the Leeds-based Bartlett Group Limited is one of the United Kingdom's leading insurance brokers and independent financial advisers. It has further offices in London, the United States of America, mainland Europe and the Far East, serving clients in over 35 countries world wide. The general insurance arm Bartlett & Company Limited provides selected insurance companies' products for high value households as well as for corporate clients that range from small family firms to multinational companies with complex risk exposure.

Bartlett Life & Pensions Limited, also headquartered in Leeds, offers independent financial advice both to individuals and corporate clients. It aims consistently to deliver an outstanding level of service in all areas of protection, investment management and retirement planning. The company also provides specialist pension administration and actuarial services. Bartlett Life & Pensions Limited is authorised and regulated by the Financial Services Authority, but some of its actuarial services are not subject to FSA regulation.

"At Bartlett Life & Pensions Limited, we pride ourselves in the high standards of professional advice and personal service we offer," says Development Director Robert Simpson. **"One essential criterion for achieving these standards is the ability of our financial advisers to access client records without fuss and absorb the background to the relationship as well as key financial information. The success of the business has meant the accumulation of large quantities of records that were becoming increasingly difficult to retrieve quickly and reliably, not to mention the burgeoning demand for storage space.**

"When we looked for an efficient and effective way forward, it became obvious that a top quality document management system would provide benefits to the company and its clients. We surveyed the market place and were particularly concerned to ensure that any document management system we chose

would be compatible with other systems we have in use. With about 30 individual system users depending on it, we did not want to make a poor choice. Having reviewed what was on offer, we opted for the Invu system from Lindenhouse Software.

"We were fully satisfied that Lindenhouse had the expertise to deal with all software compatibility issues. Like many investment advisers, portfolio managers and financial planners, Bartlett Life & Pensions Limited personnel constantly use 1st Adviser Office. It was crucial for us that our document management system could work in tandem with this. It became apparent that Lindenhouse had extensive knowledge and experience of Adviser Office and that they had written a unique integration package to dovetail both systems. They could therefore present us with an integrated solution. They also offered an impressive user training package to ensure that we could benefit from our investment in the Invu document management system without any undue delay."

For a company such as Bartlett Life & Pensions Limited, which offers such a wide range of products and services to a varied client base of individuals and corporate entities, the Invu document management system from Lindenhouse Software provides a cost-effective means of controlling the accumulation of paperwork.

The company is keen to expand, the implementation of INVU means that the amount of space currently devoted to file storage (about a third of the office) should reduce dramatically, freeing up space for new recruits. As well as offering substantial space-saving benefits INVU should enable its financial advisers to focus even more closely and directly on serving clients, by speeding on-screen access to essential client records. Serious cost-savings are in prospect and the business is better placed to maintain that absolutely key objective: delivering high standards of professional advice and personal service to clients.

About Lindenhouse

Lindenhouse provides quality IT products and services to a wide range of clients. The company is focused on document management solution provision and develops bespoke software to provide integration to all insurance and financial services back-office systems and to practice management systems in both the Accountancy and Legal sectors. Lindenhouse have installed 1700 document management systems to date and are rightly proud that it retains 95% of its support contracts – a testimony to the dedication and professionalism of the company's technical staff and help desk.

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INVU