

A Lindenhouse Case Study

Capita Fiduciary Group,
St Helier, Jersey.



CAPITA

Capita Fiduciary Group is part of the Capita Group Plc, a FTSE-100 company and the UK's leading business process outsourcing and professional service company. Capita Group delivers diverse services, including front office customer contact and back office administration activities, to both private and public sector organisations. A flexible structure facilitates efficient delivery of multiple services to clients across multiple markets.

A leading financial services provider in Jersey with local roots back to 1956, Capita Fiduciary Group offers both offshore and onshore solutions to private clients, large corporates and institutions. Its highly skilled pool of professional expertise delivers sophisticated trustee, corporate, fund and ancillary services to a prosperous international client base. It has further offices in Dublin, Amsterdam, Luxembourg and London.

"At Capita Fiduciary Group we provide fund management and administration services to a variety of offshore investment vehicles," says head of ICT support Steve Ahearne. **"These clients include cell companies, unit trusts and limited partnerships as well as different types of funds such as property, feeder and hedge funds, whether domiciled in Jersey or elsewhere. We rely heavily on technology and require maximum performance from any system we use.**

"We concluded several years ago that a refined document management system would offer considerable benefits to Capita Fiduciary Group, particularly in Jersey where the companies' growth through acquisition meant a combination of many document storage and archive systems.

"We already had INVU 5.3 installed as part of one of the acquisitions and felt its potential was not being fully utilised. It was logical to look into an upgrade to the latest version and as we already had a sound working relationship with Lindenhouse it made sense to involve them from the beginning of the upgrade project.

"Lindenhouse were on hand to provide various presentations throughout the planning stages of the project and once we had received the go ahead to proceed with the upgrade they were there to help at every step of the way with their capability to ensure seamless integration throughout the project.

"We've never had reservations about using mainland-based providers and Lindenhouse have always proved their abilities, even when supporting our previous version (5.3) when most people had already upgraded. Their people were also on the spot to provide expertise in the creation of tailor-made systems rather than simply offering a standard package like some of their competitors."

Like many users of Invu, Capita Fiduciary Group has enjoyed efficiencies and savings since upgrading its document management system. Indeed, management was so impressed that they asked the question: is there even more that we could do to streamline our document handling processes? The answer to that was a resounding 'yes!' Technologies have moved forward and so has Invu. An outstanding document management system has become even better, with Invu Series 6 now leading the way.

"Lindenhouse's consultancy and project management capabilities helped save us sleepless nights. The Lindenhouse people did a great job of migration and rollout of the new Series 6 system, which included the specific office add-in functions we had requested them to develop. Again they provided all necessary support to our own user personnel."

Invu Series 6 is a highly effective document management system with advanced functionality that is nevertheless simple to use. Lindenhouse considers the price performance to be second to none and Invu is consequently the only third-party product that the company resells. Whatever the client's precise needs, Lindenhouse has the proven ability to deliver a bespoke solution rather than just a standard system.

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.

For more information, please contact Mark Woolley at Lindenhouse.

Telephone: 01223 492266 Email: info@lindenhouse.co.uk Or visit: www.lindenhouse.co.uk

INVU