

A Lindenhouse Case Study

Haines Watts,
East Anglian Division



Local Matters, National Strength.

Haines Watts is one of the top 15 firms of Chartered Accountants and business advisory consultants in the UK. Operating from over 40 strategically placed offices throughout England, Wales and Scotland, Haines Watts provides tax, accounts and general business advice to UK businesses large and small. Haines Watts' clients range from privately-owned companies and private individuals to publicly-quoted companies, international corporates, public sector bodies and charities in the UK.

Haines Watts has no 'head office'. Instead, each office acts fairly autonomously. In 2003, the three offices comprising the East Anglian division of Haines Watts – Diss, Attleborough and Thetford – decided to look into the potential benefits of installing a document management system. Paul Sumpter, [Managing Director] at Haines Watts Diss Office, explained why:

"Like all service-based companies, we aim to build lasting relationships with our clients. In order to do this successfully, we need to store the information that shows the contact history of each case. In general, it means that we both receive and produce a lot of paper – all of which needs to be archived."

"Most forward looking companies regularly take the time to consider any technological developments that could help them to become more efficient. It was as a result of one such discussion that the East Anglian offices of Haines Watts decided jointly to look into the merits of document management systems with a view to saving time, improving customer service and downsizing the paper mountain."

In addition to being forward-looking, Haines Watts is also a decisive company. The process (whereby they reviewed three possible systems suppliers) took only two weeks to complete. Their clear favourite at the end of this process was the INVU system supplied by Lindenhouse on the grounds of ease of use and cost. The fact that INVU is integrated with Microsoft office was a very important factor. For Lindenhouse to install the system across the three East Anglian offices took only one month.

So what has changed for Haines Watts now that they have their INVU Document Management System from Lindenhouse?

Haines Watts East Anglian staff are now able to physically scan every fax, email, letter and document that they either receive or send, including signatures. They took the decision not to backscan archived documents because they felt that the benefits would not justify the time this process would take. Instead, they just started from the date when Lindenhouse completed the installation of

the software and the two systems now run in parallel. However, as time goes by, less and less reliance is put on old paper-based records.

If a client rings about a specific letter, it is no longer a case of having to call back once the document has been tracked down. Now, the users of the system at Haines Watts can view clients' records and information and find the relevant letter whilst the client is still on the phone. The system permits access to all documents across all East Anglian offices, with search functions on either date or specific words. Staff find this a much simpler way of retrieving information which results in a quicker and more professional service to clients.

As for cost savings, Haines Watts reports that the installation of INVU meant that the company's reliance on secretarial staff was minimized and whilst this, sadly, resulted in three redundancies, it is now saving the company approximately £60k per year in ongoing costs. Company policy is that staff now do their own typing. Luckily, most of the Haines Watts staff are young and computer literate anyway and this approach has been helped by the fact that they have introduced a number of standard paragraphs and templates in drop down boxes to ensure consistency and to speed up the process of writing letters and reports.

In addition to the INVU document management system, Haines Watts also bought Lindenhouse's unique Structure Generator software. This enables Haines Watts to automatically generate individual files for each of the client company's clients from their case management system.

Haines Watts is also using Lindenhouse's in-house development expertise to merge the three different databases historically used by the three East Anglian offices, into one central database which can also be accessed remotely. Lindenhouse are also installing a wide area network which means that staff will be able to access INVU from home or anywhere with an internet connection.

"I understand from Lindenhouse INVU is about to be accredited by the Institute of Chartered Accountants," says Paul Sumpter. "Given the improvements to efficiency that we've seen in the three Haines Watts offices using the system, this comes as no surprise. It's really ideal and we're very glad that we got ours successfully installed before Lindenhouse is inundated with requests from other accountancy practices. "

"Lindenhouse operates a very professional team, their engineers and help desk are great. Thanks to all for a job well done. "



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