

A Lindenhouse Case Study

Mason & Partners, chartered surveyors, Liverpool



Mason & Partners is a firm of chartered surveyors and commercial property consultants with offices in London and Liverpool. The Company was founded in 1993 by Geoffrey and Andrew Mason and employs 19 fee earners and 37 staff.

Mason & Partners are a private practice with a vast wealth of knowledge and experience specialising in the retail market throughout the UK. Whilst they are primarily chartered surveyors, they also run a variety of property companies.

The firm has seen the value of having a document management system for some time and to this end bought a Canon document imaging system several years ago. However its success was very limited. Ben Harvey, Finance Director explains what happened:

“As with all companies only some of our staff were computer literate, so in the end only a handful of staff could use the system. We needed a system that was more user-friendly and the back up of a company that would help us with any training requirements and who would be able to iron out any problems.

“At the end of the day we needed a document management system to increase the speed at which we could access documents. We keep paper files in the office, in the basement and at a remote location. We wanted an efficient document managing system that would enable us to access files in seconds rather than hours.”

Mason & Partners needed a system which could scan and document all their incoming and outgoing post and – being surveyors – they had a particular need to deal with property details and photographs, putting them in the correct project folders so that everyone could access the same information, (with the paper system there would

often be several differing project files, one for each person working on a particular client). Ben continues:

“Just as Mason & Partners were considering investing in a document management system, Lindenhouse approached us offering to demonstrate INVU. After discussion with Lindenhouse it became obvious that they would be able to tailor the INVU document management system to meet our needs. One of the main elements was the transfer of all the files from the old Canon system to INVU. We spoke to our computer consultants and they confirmed that the INVU system came recommended, so we saw no need to shop around. We asked Lindenhouse to install the INVU system and conduct the all important file transfer.”

In addition to the file transfer, Mason & Partners also wanted to integrate INVU with Microsoft Office, a task which Lindenhouse undertook as part of the installation process. Staff are receiving training and gradually becoming familiar with the system and Ben has high hopes for the future.

“I would be the first to admit that we aren’t the most computer literate company around, but we recognised the benefits to be had from installing INVU in terms of time and efficiency, which ultimately affects the bottom line. Lindenhouse have been instrumental in guiding us towards that goal.

“The most important thing for us is ease and speed of access, however whilst we don’t envisage removing any of our filing cabinets, we certainly don’t anticipate buying any more.

“The next stage that I am looking forward to is when, instead of carrying bulky boxes of files around to clients in our cars, we are able to access the whole of our system from our laptops.”

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.

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INVU