



INVU IN ACTION:

A Lindenhouse Case Study

Ward Goodman, Accountants and IFAs Wimborne, Dorset

Ward Goodman, based in Wimborne, Dorset, is a busy accountancy firm which has a successful IFA arm, Ward Goodman Financial Services Ltd. This location provides access to an affluent personal sector and a substantial business community around Bournemouth, Poole, Wareham and further afield.

The Ward Goodman businesses serve corporate clients drawn from a diverse range of commercial and industrial sectors. Some business clients are limited companies whilst others are partnerships, sole traders and trusts. Clients also include individuals requiring expert advice about their personal financial affairs.

Rapid growth and an active, varied client base inevitably result in the generation of large quantities of paper records that can be hungry for floor space and human resources. Ward Goodman certainly found this to be so in the day-to-day work of providing its many corporate and personal clients with their full range of accounting, taxation, business and financial services.

"Like almost every business we operate in a highly competitive marketplace" explains IT manager Kim Kendall "so we have to make the best possible use of our office and storage space to ensure that we can operate efficiently and keep ongoing overhead costs as low as we can. We decided that upfront investment in a document management system would make us more efficient and be self-financing within a reasonable timescale.

"It was in mid-2005 that we began the search for a document management solution for the IFA operation, which employs ten personnel out of 55 overall. We needed to ensure that anything we adopted for this 'pilot' would be compatible with our existing systems, in particular the 1st Adviser Office software that is used so widely in the IFA world. Having looked at the available options, we were most impressed with the capabilities and cost-effectiveness of the Invu system from Lindenhouse Software. We also discovered that Lindenhouse had exclusively authored the integration with 1st Adviser Office. This meant that they really knew how the system worked."

"They took the trouble to understand our precise needs and presented a solution that addressed them fully. We therefore decided to proceed with the Lindenhouse proposition and found their people both helpful and professional at every stage of the project. The process of installing the Invu system (Series 5.4) we chose was excellent, much less disruptive than some had feared, as was the hands-on training provided to the staff of our firm."



"Many months on from installation, I can say that we have been delighted with the Invu system for IFA users – so much so that in 2007 we decided to ask Lindenhouse to provide us the new version of Invu (Series 6) for the accountancy operation and to upgrade the IFA side from the old version to the new one. So we now have Series 6 for both arms of the business. We had for some time been using IRIS software systems for accountancy practice management. The fact that Lindenhouse had provided some integration with IRIS added to the flexibility and use of Invu's Series 6 product compared with other offerings."

"We chose Lindenhouse again in preference to a couple of other options that were presented to us," Kim Kendall adds. "Mark Woolley's presentation was impressive and backed by an understanding of our business environment. Initially, the competing quotations were similar but as we worked on the detail of what we required, the Lindenhouse offer stood out in value-for-money terms."

"What's more, the quality of technical support received from their personnel throughout the IFA and accountancy installations and the IFA upgrade mean that we would have no problem in recommending Lindenhouse to other ambitious accountancy or IFA firms. Where we have raised technical issues with Lindenhouse, they have been on the case quickly and gone the extra mile to find the best solution."

"They were particularly helpful in efforts to ensure fully effective operation of the CcInvuPrint facility – an exclusive Lindenhouse integration – which we had specified for use in conjunction with IRIS Auto Mail. The CcInvuPrint facility means that the system intercepts documents that are bound for a printer and creates images of them, which are then automatically stored in Invu."

"With everything on the system, the problems of record storage and retrieval diminish, enabling us to devote more resources to our primary job of serving our clients in a highly professional manner. Invu is so user-friendly, with 'simple' and 'advanced' interface facilities designed for different levels of computer skill on the part of system users."

"The fact that Lindenhouse had authored the integrations with Adviser Office and IRIS has helped us to get the most out of Series 6. Savings in floor space and costs are coming on stream. Creating enough space for about eight extra desks by dispensing with most of our filing cabinets was a key part of the equation, as ongoing business expansion would otherwise have forced a disruptive move to larger premises. This really has been a major benefit. We also expect to start saving about £4,000 a year in off-site storage and associated access and retrieval costs."



Ward Goodman is one of many accountancy/IFA businesses to have recognised the potential benefits of the Invu document management system from Lindenhouse Software, whose expertise extends to delivering system integration solutions to ensure compatibility with other systems that may be in use. Both arms of the progressive Ward Goodman business can now look forward to continued growth without concerns about being overwhelmed by paper-based records that may become increasingly difficult, inefficient and costly to store and retrieve. Swift access by authorised staff to records on-screen makes life easier for them and therefore benefits clients too.

About Lindenhouse - Awarded the first ever Invu Centre of Excellence Award

Lindenhouse provides quality IT products and services to a wide range of clients. The company is an Invu solution provider 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 is a Premier Partner of Invu Services and is the world's largest reseller of Invu software. Lindenhouse have installed 1400 Invu 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. Lindenhouse is very pleased to have received the first ever Invu Centre of Excellence Award. The award shows Lindenhouse's commitment to providing customers with the highest standards of service.

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