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## INVU IN ACTION:

### A Lindenhouse Case Study

#### *Turner & Co, Leicester*

#### ***Bottom-line benefits of Electronic Document Management (EDM) from Invu - Turner & Co Save more than £75,000 while Improving Efficiencies***

Turner & Co are award-winning commercial insurance brokers and independent financial advisers based in Leicester. Founded in 1993, the firm currently has 30 staff and provides broking services to clients around the UK for all classes of Business Insurance, Risk Management and Personal Insurances. Their independent Financial Advisers provide expert advice on corporate and individual Life Assurances, Pensions and Investments.

#### **The challenge**

In a competitive market, insurance companies and IFAs need to ensure they are ahead of the game when it comes to industry standards and regulations. Turner & Co are fully regulated by the Financial Services Authority (FSA) and like other firms needs to comply with its Policy and Standards on Records Management. For example, files need to be produced on request within a minimum of two days, and must be stored for a minimum of seven years after creation.

Compliance remains a top concern for firms like Turner & Co who need to ensure that the right information reaches the right people in a timely way. Paper records can be problematic as they are vulnerable to age, fire, flood and misplacement which can leave firms in a tricky situation and potential fines and penalties. But best practice when it comes to document management is about far more than compliance and strikes at the core of customer service and retention.

In 2001, the issue was becoming particularly glaring for Turner & Co, and the company were looking at ways to solve a major storage problem and improve the efficiency of service and document management.

With over 50 filing cabinets, space was becoming a problem and the company had considered taking on new premises to cope with the sheer volume of increasing paperwork. Staff time was increasingly being spent filing and retrieving documents and frustration levels caused when trying to find specific records quickly were rising as documents were often simply piled around desks until staff found time to file them.

Explained Chris Ecob, Compliance & Operations Manager, Turner & Co; "It was pretty clear that this situation could not continue, and as the paperwork increased it was only going to deteriorate. We wanted to avoid having to move office just to accommodate all our storage needs. The cost to the business would have been excessive at well over £25,000."



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## **The solution**

Turner & Co began to think about possible technology solutions to their predicament. Having learnt about EDM systems at an IT roadshow, they were recommended Invu as a cost-effective way to securely store all their documentation electronically and therefore dramatically cut the floor-space needed for storing old-fashioned filing cabinets.

Peter Shaw, Partner and Chris Ecob had a personal introduction to Invu and decided that it would immediately provide a simple solution to their growing storage problem.

In July 2001, the firm made an initial purchase of 18 licences of Invu S200 – which were implemented for each staff member at the time. Documentation relating to more than 3,000 clients was back-scanned over the course of six months. Document types included Invoices; Policy Documents; Emails; Customer Correspondence; Training Manuals and HR records.

Through Invu's key reseller partner Lindenhouse, Turner & Co have increased the number of users to 30 and purchased a total of 30 Advanced CodeFree licenses, which allows the firm to integrate with other applications. This includes Brooms from OPEN GI (formerly Misys), their primary back office system. Lindenhouse have also supplied Invu:CCD which allows bespoke integration with their other back office system from QUAY Software.

## **The benefits**

Once all Turner & Co documentation was scanned, space for an additional five desks was freed up and at the end of the back-scanning process 50 filing cabinets were consigned to history. One third of the existing office space was saved which equated to £10,000 per year in rental costs alone or £50,000 to date. There was also a significant saving of around £25,000 which would otherwise have been spent on expanding or relocating premises in order to create further storage space.

More recently, the firm has increased its storage capacity to 220GB the equivalent of 200 storage cabinets, which they would otherwise not have had the physical capacity to store on their premises.

The cost of day-to-day photocopying and stationary needs has also been hugely reduced resulting in a significant saving over time.

All documents are now secure and instantly accessible, saving staff an average of 30 minutes each day either filing or searching for documents. Up-to-date versions of documents can be easily shared without the need for carrying them up and down stairs. Files do not 'go missing' – including emails, which are automatically stored and indexed using Lindenhouse's Automatic Capture functionality.

In 2006 and ever since implementation, all documents created or received by Turner & Co are stored and indexed using Invu while the extra space has allowed the business to expand and accommodate nine new members of staff.



Integration with OPEN GI, which holds all Turner & Co customer details, allows staff to deal with queries instantly when a customer calls using the system to open both the most recent customer history and record details. Invu allows all records relating to a customer to be identified regardless of the format of the document or the application in which it was created or is stored.

The overall improvement to customer services has been extremely beneficial as Turner & Co are able to send customers the information they need almost immediately using Invu and customer enquiries can be sorted in a couple of clicks.

Says Chris; "Invu never fails, and the document you require can be found in seconds. The additional functionality of e-mailing or faxing clients without having to leave your chair has increased our efficiency ten fold. Staff tell me that there is very little that can be done to improve its functionality in terms of our current needs and the support we have received from Lindenhouse has always been excellent.

"We see our relationship with Lindenhouse and Invu as a long-term partnership which gives us the flexibility we need and the confidence not to have to worry about our documentation."

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### ***About Lindenhouse – holders of 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/financial services back office systems. Lindenhouse is a Premier Partner of Invu Services and is the world's largest reseller of Invu software. This year, 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 and provides considerable benefits from Invu – including priority dispatch of new software and priority technical support - that can be passed on to Lindenhouse customers.

#### **For more information:**

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