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## **INVU IN ACTION:**

### **A Lindenhouse Case Study**

#### ***Nicholsons Chartered Accountants and Business Advisers, Lincoln***

Chartered Accountants and Business Advisers, Nicholsons, was established in 1923 and has a long history of supporting businesses in the East Midlands region. Today, with a staff of 60 all based in Lincoln, Nicholsons provides clients with a broad range of commercial services. These include accountancy, business advice, financial services and human resources.

According to Nicholsons' IT manager, Steve Baynton, the company is not an early adopter of new technologies but likes to keep up-to-date and so will install new systems once their business efficacy has been proven.

So why did Nicholsons install a document management system?

"Eighteen months ago, we moved from our old Victorian offices in the town centre to a new business park on the outskirts of Lincoln," explains Steve Baynton.

"We took the opportunity of the move to update some of our technological infrastructure. Along with a new network and servers, together with IP telephony, a document management system had been fairly high on our wish list for a few years; the main reason being our concern about how we would recover from a disaster scenario such as an office fire.

"A second key driver for the document management system was the increasing need to access documents remotely. A file in the filing cabinet is completely out of reach unless you are physically in the office, but a document in an electronic management system can be accessible from anywhere, whether it be the client's premises, or even from home.

"Our regulators require us to keep client records for a minimum of six years but for some clients, we have a relationship that dates back to the 1950s and we feel morally obliged to keep these records as well. The sheer volume of paper records that we have built up over the course of more than 80 years in business is actually staggering."

In addition to 280 metres of movable shelving and numerous filing cabinets within their new offices, Nicholsons also has a very large archive of files in long term storage. Over the course of time, however, they hope that scanning and electronically storing their paper files as and when they are needed will reduce both the paper and the legwork that is currently involved with client administration.



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How did Nicholsons come to choose Lindenhouse to supply their document management system? Steve Baynton explains:

“Well our interest increased after we attended a 2020 Professional Membership Group industry conference where one of the speakers was extolling the virtues of the Invu system. We were very impressed with what we heard and agreed amongst us that having something similar would definitely be of benefit to our business. We then discovered that Invu is only sold through a network of approved suppliers, so the next problem was to find a supplier.”

Coincidentally, Nicholsons were approached by Lindenhouse, who pointed out three interesting facts:

- First that Lindenhouse is the biggest reseller of Invu in the UK, with a very large and well-trained support team.
- Secondly that Lindenhouse is very expert in the application of Invu within accountancy and financial services companies.
- And thirdly, Lindenhouse is now the preferred document management partner for 2020 and have been invited to speak at their industry seminars.

Nicholsons invited Lindenhouse to come and tell them more.

“We were immediately impressed. The Lindenhouse representative was very knowledgeable and reassuring. After conducting a thorough site survey, he was immediately able to give us a pretty detailed explanation of how the software would fit into and speed up our work processes. He ran through the other software packages that we use on a daily basis – the accountancy division uses Iris and Sage for the back office, our Financial Services department uses CCD from Quay Software. Lindenhouse explained that they were integration partners with Quay and could also integrate with both Sage and Iris. This meant they would have no problem in configuring Invu to work seamlessly with our current systems.

“So, on the basis of being confident in the product and the supplier and finding the price competitive, we decided to go ahead.

“Two Lindenhouse experts visited our offices for three days to complete the installation and training. During this time they trained 48 members of staff. Our staff were very impressed with the training given, which was comprehensive and easy to understand. With the right guidance, the software is pretty intuitive. It does what it says on the tin. Ongoing support from Lindenhouse since installation has been both courteous and efficient and we feel totally confident that we have made the right decision in opting for an experienced supplier,” said Steve Baynton.



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## Process

Introducing Invu software has changed the internal processes at Nicholson's and will continue to change them for the better. The emphasis is now on scanning and e-filing rather than on storing paper documents. There is a reduced need for delving into archives in deep storage – a need which will all but disappear over time. With the time saved, and the possibility for remote access, Nicholson's envisage that their staff will be able to work more efficiently and more flexibly and that will help them to expand their business.

## 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, see [www.lindenhouse.co.uk](http://www.lindenhouse.co.uk)

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