

## Savills

### Case Study



## A Productivity Lever in Property Investment

**Global leader and adviser to real estate clients, Savills has a network of over 500 offices spread across the four corners of the world. The French branch of this property management company is making a move toward becoming a paperless office. They have been using DocuWare solutions for 7 years and continue to develop automated processes.**

In 2005, electronic document management (EDM) and the property sector were miles apart. Savills is one of the very first companies to turn the corner in terms of EDM. "It was as if we were still living in the dark ages with everything in our organization 100 % paper-based. We had folders and archive boxes stored away that we consulted occasionally. We had a lot of trouble sharing information since we had to physically go to the data ourselves," Christian Bertrand, who heads property management at Savills, explains.

With property management and administration at the heart of the business, the company manages a large flow of documents arising from the loss or gain of contracts for prestigious office and residential buildings. Among these documents is the permanent file, which is a record of the works and the investment carried over the duration of each contract for each property.

Among other things, this special file values the fees that can be realized from the transfer of a property. The availability and control of a document database are critical because Savills' clients require strategic information at any moment. For property managers, the physical data room where buyers come to consult information before making a purchase offer is over. "EDM has naturally made its mark as a productivity lever and as a factor that differentiates us from our competitors," explains Christian Bertrand.

### Savills

**Industry:**  
Property Investment

**Location:**  
Paris, France

**Application:**  
Administrative and Technical Services

**Document types:**  
all documents relating to the building (permanent file)

## Requirements

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- Streamline work and make productivity gains
- Remove all disputes in the management of original documents
- Provide the best service to the end client

## Task

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- Reduce the storage of paper documents
- Optimize information sharing
- Develop a cross-classification system throughout the permanent file

## Solution

Savills entrusts DocuWare with the careful development of a solution to handle all documents relating to contracts. These documents are accessible round the clock from data rooms dedicated to building management entirely based on digital data. The real estate services provider is thought of as a pioneer by turning to technology to achieve greater efficiency and transparency. DocuWare takes care of integrating the software and developing the connector to facilitate the exchange with the ERP system Prémiance by Taliance installed at Savills. An archive of almost 400,000 pages is fed into the EDM and archivists are trained to recognize and interpret the documents before archiving them in accordance with a specified classification plan.



## Benefits

While the DocuWare EDM safely receives, classifies, and archives all the documents from Savills' ERP system, the documents are remotely accessible at any time and items can be easily downloaded. When a contract is returned, Savills can determine the type of information delivered to the competition, thanks notably to a cross-classification plan which allows strategic data to be retained. In the event that a property is sold, the quality of documents and their immediate availability can optimize the transaction.

## Benefits

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- Guarantee the security and availability of original documents
- Rationalizes the contract management processes
- Facilitates the transmission of documents in the event of arbitration or loss of contract

## Implemented Modules

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- Autoindex

## Conclusion

Savills has been using DocuWare for a number of years without encountering any major problems. "Creating an EDM is a matter of will, digitization being the most time-consuming part and partner involvement the most difficult," Christian Bertrand acknowledges. The next processes to be implemented include setting up an approval workflow for supplier invoices, industrializing data room deliveries, and the implementation of location intelligence tools to provide investors with the means to remotely supervise the management of their assets.



"EDM has naturally made its mark as a productivity lever and as a factor that differentiates us from our competitors."

*Christian Bertrand, Director of Property Management, Savills, Paris*



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