



CASE STUDY: Document Manager™ – FirstPort

A Document Management partner provides continuity and a stable platform for business development and growth.



Company: FirstPort

Country: United Kingdom

Industry: Property-Related Services

Profile: FirstPort is a leading provider of property-related services in the UK.

Key Drivers: Unacceptable amount of space used for document storage. Security of documents across various offices throughout the UK. Business integration and automated processes for efficiency.

FirstPort is one of the largest Property Management companies in the UK, with a long history and a wealth of experience. FirstPort initially asked Document Logistix for help to streamline their business processes, and has since reaped the benefits of extensive integration.

FirstPort services include residential property management, residential lettings, retirement property sales, and building and contents insurance.

FirstPort is a national organisation with offices in New Milton, Luton, Glasgow, London, Halesowen and Lymington.

Moving towards a paperless office environment

The biggest initial driver for FirstPort was the need to deal efficiently with the sheer amount of paper records processed in their offices. The amount of office space taken up by paper was reaching unacceptable levels. 5-10% of office space was devoted to document storage.

With over 3700 Developments under management across England, Scotland and Wales and 5 operational offices security is also a significant factor for FirstPort.

With burgeoning distributed information, it is essential that the business has a secure document management strategy in place that includes safeguards against the potential loss of documents through willful activity such as theft, as well as accidents such as fire, to protect business assets and comply with regulatory requirements.

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“A large number of people throughout our businesses use the system and they have adapted to it extremely well; this is a key function to some individual job roles”

FirstPort CIO



Choosing Document Manager

FirstPort produced a set of business requirements in order to shortlist a number of potential suppliers, which became a shortlist of two companies.

The functionality that Document Manager offers met most of the business requirements and the product offered enough flexibility for future development in relation to document management; for example, secure remote document access.

Expanding Document Manager Capability

When a company implements Document Manager, it experiences new and tangible benefits which, once assessed by management, can be rolled out and extended throughout the business and even to partners and customers.

The age of the department silo is passing and standardisation is important to gain benefits across an entire business.

The type of documentation and its various formats (paper, digital, email attachments, photographs, and more) can be reduced in complexity and handled in relatively simple rules-based workflows that improve staff productivity and operational effectiveness.

FirstPort's document portfolio includes tenancy documentation, contracts, human resources information, insurances and health and safety policies, as well as accounting and invoicing information, which may be the first point of DM implementation for many organisations.

Integration with Industry-specific Systems

Document Logistix is recognised for both its consulting and implementation expertise in integration. Customers comment the Document Logistix solutions are holistic compared with workarounds offered by competitors.

Document Logistix integrated Document Manager with Qube PM, FirstPort's preferred software for commercial, residential and mixed use property management, which directly links FirstPort's document flow with its CRM systems.

Document Logistix also managed the integration of COUPA, a cloud-based spend management suite described as savings-as-a-service.

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Continuous Development and Automation

Looking to the future, FirstPort will be able to take advantage of system automation and introduce processes that save huge amounts of time and help the company to comply with document and data regulations providing more time on customer service.

Managing document retention policies manually, and even when they are semi-automated, is complex and risky.

FirstPort is working with Document Logistix as its strategic partner to introduce automated document retention policies to ensure that documents are stored for the required length of time or destroyed on the date dictated by regulations.

Benefits of Document Manager

- Speed of a document-centric process
- Secure retrieval of information from remote locations
- Elimination of paper, freeing up valuable floor space
- Simple integration with legacy and third party systems
- Streamlined, through-business processes
- Secure document access for authorised users
- New efficiencies with the potential for automation

The Document Manager Solution

Document Manager has enabled staff at FirstPort to access important information from any location, both in the company's offices and when working remotely, while the company's officers can be certain that the company's information remains secure at all times. The streamlining of business processes has also led to increased staff productivity.

With Document Manager, FirstPort is now able to control who has access to client documentation, which helps them to deliver higher levels of client confidentiality.

As a result of using Document Manager, FirstPort now enjoys economies of scale and a more efficient Purchase Ledger department. FirstPort has been impressed by the flexibility of Document Manager and has found that the retrieval and indexing of documents works extremely effectively.

FirstPort are happy with the performance of the software and there has been a positive reaction throughout the business, in which clear benefits have been defined.

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