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The intuitive CASE manager for Office 365

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Everything in its place: CALA Homes transforms case file handling across eight UK regions with **Repstor custodian**

CALA Homes is a leading, upmarket UK homebuilder, targeting sought-after areas in eight regions across Scotland, the Midlands and the south east of England.

From building plans and designs to plot reservations, part-exchange agreements and sales contracts, the business handles a wealth of important documents and case files which must be readily accessible by those who need them, to keep processes running smoothly. This is essential for internal efficiency, for maintaining a professional image and the high-end customer experience clients expect, and for complying with regulatory requirements around document and data handling.

Making sales document management seamless

CALA is a long-standing user of Microsoft SharePoint, a collaboration platform that brings order to content management across teams and locations. As part of its plans to migrate to SharePoint 2013, the company wanted to improve the management of plot-related case files, including documents such as sales agreements and email. The company can be managing 800 building plots at any one time, yet in the legacy system documents were often passed back and forth via email - for example between sales teams and clients - making it a challenge to keep track of latest versions to get a snapshot of progress across regional offices.

"Each region had a different system and different processes for managing documents and emails," explains Paul Stevenson, Project Manager at CALA Homes. "We wanted to create a common, consistent case management structure that would make it easier for sales teams to instinctively save and manage documents into the SharePoint platform, without even realising they were doing it

custodian captures the imagination

In conversations with a Microsoft solutions partner, CALA was introduced to Repstor custodian™, a secure case and email management solution for Microsoft Office 365 and Microsoft SharePoint. CALA Homes approached Repstor to assess the feasibility of using custodian for managing plot file cases. A proof of concept quickly concluded that custodian would be the ideal solution, enabling case templates to be rapidly configured defining each of the required case file types including case structure, security, metadata and template documents.   Case files are then easily created from these templates and provisioned in SharePoint either manually or automatically through integration with CALA's existing systems.

It was this ease of configuration and automated SharePoint provisioning out of the box, without the need for a bespoke SharePoint provisioning solution, that clinched the decision to choose the Repstor product, Paul explains. Custodian also comes with a simple API capability, making it very straightforward to integrate the system with CALA Home's existing ERP system, for automated plot file creation.

As CALA Homes already used another Repstor product, affinity, to provide email and document management capability for SharePoint directly within Microsoft Outlook, CALA already understood the benefits of teams being able to access plot case files either via SharePoint or via Outlook. It meant that they would be able to continue to work in the way that felt most natural to them, without jeopardising the new centralised approach to case file management.

Other than a few days' training and consultancy from Repstor to help CALA Homes configure custodian and integrate it with the company's ERP system, the company was up and running with custodian quickly. This is in great contrast to the deployment time that would have been needed if the company had had to create and integrate a bespoke solution.

Consistency brings order

CALA Homes has rolled out the system, which it has named PlotFiles, in phases. It is currently used by 200 sales people for its current purpose, but the expectation is that the highly scalable software will be used by 400-500 people in due course. Once the benefits of custodian and affinity are seen across the organisation, it is expected that other teams will look to apply the same solution to other case management scenarios, beyond plot case management. The business is already working on additional rollout plans.

The overriding benefit to the business, its teams and clients is efficiency, which comes from the consistency the software enables, and the rich user experience for email and document management. "All the regions are working in the same way which is adding hugely to consistency across the business," says Andy Murray, CALA Homes' IT director.

"We can manage template documents, for example for reservation forms, and users can easily create and store documents against a particular plot, simply dragging and dropping documents in Outlook folders, while maximising SharePoint's potential as a document management tool."

The inherent rigour of the system, meanwhile, forces users to capture key information up front, which previously might have been hard to find within the body of a document. "Capturing key metadata such as the name of a site, plot, customer and their history, is bolstering consistency, making everyone's lives easier," Andy says.

This consistency across regions had delivered additional benefits too including greater transparency about where documents are, and where processes are up to, as well as increased confidence that document storage and management complies with evolving data protection legislation. Paul adds, "This helped us significantly in meeting our recent GDPR obligations too as we already knew where information was, how to access it and the controls around it."

Easy deployment, rapid uptake

The software has proved to be excellent value for money. "The Repstor solution is very reasonably priced, especially given the benefits we've already experienced," Andy says.

The payback has been boosted by enthusiastic user acceptance. "We've had very quick buy-in and on-boarding with the sales people because they haven't had to change the way they work," he notes. "We hardly needed to do any training, and handovers could even be done remotely. Repstor's software is extremely easy and very rapid to deploy."

Of the plans to expand use of Repstor's products across the business, Paul Stevenson foresees potential rollouts of custodian across legal, commercial, land teams, customer services and finance. Technical teams, meanwhile, could use it to manage and share documents more systematically with architects and surveyors, without reliance on email.

"If there's a process relying on email for document exchange, especially if dealing with external clients, then this is the obvious solution," he says.

"Engaging with Repstor has gone very smoothly. "It's been a very positive experience," he concludes. The team are very collaborative. They delivered on their promises, and we have a solution with fantastic potential. We're delighted."

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