

BRUNEL INDEPENDENT MORTGAGES CASE STUDY

Brunel Independent Mortgages, Mortgage broker and Independent Financial Advisors, have two offices in Devon and Cornwall. The first is in Plymouth, the second is located in Saltash, beside the world famous Royal Albert Bridge. The bridge was completed in 1859 by Isambard Kingdom Brunel, who lends his name to the company. Started by Chris and Marc in 2005, the company has doubled in size over the last three years.

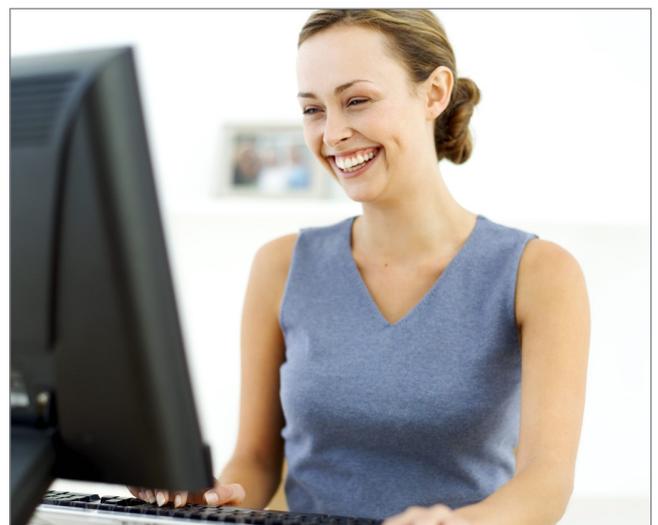
ANALYSIS

As the new business started to grow it was clear that systems needed to be put in place to maintain the expansion of the business whilst making sure their clients still received the excellent level of service they deserved.

Chris Kearney, Director, Brunel Mortgages said “Being regulated by the FSA, we have strict requirements for keeping client records. We were buying an additional filing cabinet every 6 months (one branch only) and so soon realised we would run out of storage room. Space and security of information is a concern for every business but especially when you deal with clients information. It was also recognised early on that access to our client information could not be stored off site as a significant portion of our business with clients is repeat. We needed to retrieve documents specific to clients accurately and without delay. The introduction of the Invu system allowed us to index all our information into the system quickly and efficiently.”

Brunel looked at various solutions to their issue and needed to find a something that was both economical and easy to use for all their staff.

“We were aware that we could scan and file using windows and our own network system, but we needed a solution that staff could use to find client documents without asking for help. Invu offered us a solution that was robust with good levels of functionality. Invu’s excellent security features as well as a controlled method of indexing and saving our information was essential.”



YourDMS SOLUTION

The systems ability to define a structure that allows any kind of document to be found in seconds and with minimal hassle was a key reason why Brunel bought Invu.

Brunel Independent Mortgages use Invu to handle all their document storage and retrieval needs.

Invu offers exceptional functionality to capture documents as work in progress and its ability and link to the Microsoft Office suite of products seamlessly is a major plus. They are also planning to use the system to capture all emails, again saving even more time.

“Invu also integrates with our existing software, which makes it a slick process to retrieve and save documents from our existing database.



RESULT

One of the biggest motivators for purchase was the speed of retrieving documents. Even if you don't have the correct document name, you can ask Invu to find documents with say a certain address referenced within the text. It does this extremely fast. A search like this could take a whole day, if done manually, which would of course be impossible." said Chris.

Chris added "We have allowed our staff time to become familiar with scanned documents first, but fully intend to use Invu for work in progress files in the very near future. Then all staff members will be able to access the ongoing files quickly no matter which branch location they are working."

Having now gone through the initial installation of Invu and then a full upgrade from 5.4 to Series 6, Chris and Brunel are well qualified to comment on the support they received from YourDMS and Invu.

"I have found the ongoing support to be very helpful, and indeed friendly. After the initial installation, we upgraded our IT equipment, which meant changing our Invu installation.

We had a unique issue to resolve and Invu sent one of their own technicians to visit our premises to resolve the issue. This was done at no charge and is a testament to their commitment to customer service," stated Chris.

"I have found the ongoing support to be very helpful, and indeed friendly. I would definitely recommend INVU to others. We probably only currently use half it's capabilities, but what we do use, exceeds our level of expectation.

"We have now set up an intranet between our offices. This has meant we can access INVU documents from anywhere in the world via the internet, even from home. On numerous occasions this has saved a special visit into the office. I can not begin to imagine what we would do without Invu, would I go back to our old ways, not on your life"

Chris Kearney
DIRECTOR AT BRUNEL INDEPENDENT MORTGAGES



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