

Case Study





# Scrutton Bland Regains Valuable Floorspace with Interwoven WorkSite

## The company

Scrutton Bland is one of the largest independent accounting practices in North Essex and Suffolk, employing around 150 staff. The firm has offices in Ipswich and Colchester and provides an extensive range of services including accounting, tax, audit, corporate finance services and business advice.

## The challenge

Scrutton Bland needed a solution that could provide a repository for managing all of their paper and electronic documents. The company relied on paper filing, which was time consuming, cumbersome, costly and often not a true reflection of the most up-to date and complete picture.

All documents, including e-mails, had to be filed away, but still be available when needed for re-use or editing. Consequently, the firm used over 60 cabinets for filing which required two rooms just to house them. Every client engagement had a large paper file associated with it, that had to be continually retrieved from the filing cabinets, taken to meetings, re-filed, then found again and physically carried to the next meeting.

## Interwoven's solution

"Our e-mail traffic has increased steadily over the past five years but we were still printing off and filing every e-mail. As a business we recognised the need to change the way we deal with documents, in particular e-mails. We researched several packages and reference sites and also talked to users and we realised that we needed a solution with a comprehensive document and e-mail management facility," explained Nick Banks, Partner at Scrutton Bland.

*"The Interwoven WorkSite system is well liked and well used within the firm. It's fair to say, we would all now be lost without it. New staff, even those coming from top City firms, comment on the quality of the system and staff feel well-supported by it."*

*Nick Banks, Partner, Scrutton Bland*

Scrutton Bland chose Interwoven WorkSite, a best-of-breed solution that integrated with the firm's existing practice management system. Using WorkSite, users can manage a complete client file containing electronic documents, e-mail, scanned paper, and other files. Scrutton Bland worked with APS, an Interwoven partner, to integrate WorkSite into its existing systems.

With WorkSite, electronic documents can be saved directly from applications such as Microsoft Word, Excel, Adobe Acrobat, and the firms Accounts and Tax Return production programs. Managing e-mail with WorkSite is as simple as dragging and dropping from a user's Inbox to a client file in Outlook.

The firm also selected integrated scanning software that allows employees to scan and file paper documents directly to a particular client file.

Scrutton Bland first rolled out WorkSite to employees in its Colchester office. This was timed to coincide with an office move, so when employees logged in on their first day in the new office, the software was already loaded onto their

## Industry

- Accounting

## Challenges

- Rapid growth of the firm meant that they were struggling to accommodate new staff and were planning to source additional space elsewhere.
- Staff still relied on paper files stored in filing cabinets in two rooms in the building. Retrieving and re-filing the paper files was time consuming, cumbersome and costly.
- Exponential growth of e-mail was adding to the burden with the firm still printing all e-mails and placing a copy in the paper file.

## Benefits of Going Paperless with Interwoven:

- Within a year, the firm has seen a full return on their investment, and the amount of chargeable hours and general productivity has increased.
- The two rooms that were used to house 60 filing cabinets now seat 10 employees.
- Employees find it much easier to trace any content they have for a client, whether in the office or working from home.
- The firm has recognised the need to change the way they deal with documents, in particular e-mails to achieve a true reflection of the client engagement file.



*Scrutton Bland is one of the largest independent accounting practices in North Essex and Suffolk. The firm provides an extensive range of services including accounting, tax, audit, corporate finance services, and business advice.*

## Solution

Interwoven WorkSite provides a shared environment for storing, organising, and managing business content. Documents - both paper and electronic - e-mail messages, and other files are consolidated in a central library, making them easier to find, share, and reuse. Automated notifications, advanced search capabilities, and features for tracking and managing milestones streamline business processes and simplify the handoff of work among team members. Other capabilities ensure that information is accessible anywhere at anytime, providing employees with access through an employee Intranet, Extranet, and from Mobile devices, and clients with access through a Client Portal.

computers. Electronic Client Files in WorkSite were accessible from within Microsoft Outlook, providing an easy way for employees to access documents and store e-mails that were previously either printed or stored in Outlook folders. This helped employees easily adapt to WorkSite. In fact, when the new system was first proposed, some of the partners were a little sceptical, but within 8- 10 weeks of the roll-out, they were convinced.

The Ipswich office roll-out followed, and then home and other remote workers were integrated into the system too.

The Outlook interface in Interwoven WorkSite was key to the smooth transition as it was very familiar and therefore training was quite straight forward. Banks said, "When implementing new systems, having similarities to current systems helps in employee integration. The Outlook interface was an area staff could identify with and work around."

Banks added, "The Interwoven WorkSite system is well liked and well used within the firm. It's fair to say, we would all now be lost without it." Scrutton Bland now has 100 users of WorkSite, and in the past eighteen months, over 230,000 documents have been saved in the repository.

## Reaping the benefits

Within a year, Scrutton Bland had seen a full return on their investment in Interwoven WorkSite.

In the Ipswich office, the rooms that had previously been used to house the filing cabinets now seat 10 employees. As Banks explains, "The growth we have achieved meant that we were struggling to accommodate our team in our existing office and were considering the need to take-on additional office space. The creation of more work space in our existing office has enabled us to avoid the need to source additional space elsewhere. This represents a great cost saving."

Since implementing Interwoven WorkSite, any documentation received is now checked by a partner, scanned and saved directly into the appropriate client file—the company no longer uses the paper files. These hard copies are now stored only for one year in the cellar.

Scrutton Bland employees now find it much easier to trace any content they have for a client, whether they are in the office or working from home. Employees often travel between the two offices and whichever one they are in, they can get immediate access to documents and e-mails. In particular, tax return preparation is now much faster. "The number of chargeable hours and our general productivity has increased thanks to Interwoven WorkSite," adds Banks.

The firm also feels that the implementation has had a positive effect on the image of the firm and its recruitment and retention. "New staff, even those coming from top City firms, comment on the quality of the system and staff feel well-supported by it," comments Banks.

Banks and his team are now looking at rolling out additional collaboration functions in Interwoven WorkSite. They plan to offer clients 24x7 access to information such as tax returns using Interwoven WorkSite's Web portal capabilities, which could even help clients become more efficient too.

## About APS

Since inception in 1991, APS has been a relationship and service based organisation that moulds business process software around the individual business requirements of each of our clients. Our clients include a broad range of firms from the largest members of the Big 4 and their consulting cousins to mid-size and much smaller firms. For more information, visit [www.aps-advance.com](http://www.aps-advance.com)

## About Interwoven

Interwoven is a global leader in content management solutions. Interwoven's software and services enable organizations to effectively leverage content to drive business growth by improving the customer experience, increasing collaboration, and streamlining business processes in dynamic environments.

Interwoven, Inc.  
160 East Tasman Drive  
San Jose, CA 95134 USA  
(408) 774-2000

Copyright 2008 Interwoven, Inc. All rights reserved. Any Resolution, Anywhere, ConfirmSite, Content Network(s), Content Services SDK, ControlHub, DeskSite, DiscoveryMining, FileSite, iManage, iManage & Design, Interwoven, Interwoven & Design, Intrago, LiveSite, MediaBin, MetaCode, MetaFinder, MetaSource, MetaTagger, OffSite, OpenDeploy, Optimost, Primera, Scrittura, SmartPublisher, TeamSite, TeamXML, TeamXpress, WorkDocs, WorkPortal, WorkRoute, WorkSite, WorkTeam, the respective taglines, logos and service marks are trademarks of Interwoven, Inc., which may be registered in certain jurisdictions. All other trademarks are owned by their respective owners. All rights reserved. cs\_scrutton\_bland\_APS\_singlepg\_20090122