



M-Files Success Stories 2009

Combining CRM and DM to Handle Greater Complexity

UK Contractor Beech Builders expands on Customer Relationship Management capabilities to include all company documents

Customer Relationship Management (CRM) software is supposed to track all dealings with your clients from initial inquiry to the follow-up after final delivery. There are a number of CRM alternatives available, but most assume you have a straightforward workflow. But what if your business relationships are more complicated, or your requirements change from project to project? UK general contractor Beech Builders faced these same challenges last year.



“Beech Builders is a specialist building contractor,” says Managing Director Le Roux Cilliers. “We mainly do insurance repair to buildings damaged by events such as fire, storm, flood, or accident. We work with a high volume of contracts assigned to us by insurance companies and loss adjusters. These contracts have significant requirements for tracking events, like email correspondence and phone calls, as well as documentation, such as estimates, approval documents, photos, and so on.”

What makes the workflow difficult to track in this case is that the company does not serve a single master per project, but several. Beech Builders works not only for the property owners but also their insurance claim agents and loss adjusters, who specify work requirements based on strict service agreements and determine the bill for the completed work.

Besides that, Cilliers explains, the company has to manage communication and documents between a varied cast of suppliers, subcontractors, and local officials. Beech Builders used to handle its digital workflow with a customer service system called ACT! for Workgroups by SAGE Group PLC. But Beech Builders’ 450,000-document index did not fit tidily into a prescribed box. The old system could only tie together some of the customer data.

“We also ran into capacity limitations with ACT, since we receive or generate 250 to 500 new documents every day as well as a very high volume of emails,” he explains. “One of the challenges we often face is we don’t deal with only one insurer. A property might have more than one policy from different insurers, so we actually have to deal with multiple claims managers and loss adjusters, each with their own

set of requirements to track. The ACT program lacked the flexibility to include these kinds of interactions.”

Searching for a CRM solution that includes flexible document management

About 18 months ago, Cilliers started the search for the replacement of its contact and opportunity management system. “We looked at several other CRM packages, but decided that we wanted something more than a pure CRM system,” he explains. “The solution had to manage not only our customer activity, but also all of our other business information needs. After an initial investigation and elimination phase, we decided to give M-files the heads-up, based on its flexibility. M-Files had powerful search optimization and the ability to deal with both constantly changing CRM and DM (document management) requirements.”

[M-Files](#) by Motive Systems is a document management system that associates each document created by Windows applications with project-appropriate key terms. Instead of identifying documents by file names and categorized folders from which they can easily be dislodged, the M-Files keeps project information solidly organized by storing and retrieving items according to precise database attributes. The same descriptive tags can be applied to contacts and relationship events – customers, emails, faxes, phone calls – turning M-Files into a powerful CRM system. Key-term definitions associate these customer events with all other project documents, like photos of property damage, CAD plans, health and safety compliance forms, works estimates, invoices, and so on.

Motive Systems offers an optional CRM module built on to the core document and information management capabilities of M-Files. This allows Beech Builders to relate all its file content according to lists of business contacts.

“M-Files document management software included all our CRM requirements -- the capabilities to import all our historic records, opportunities, documents and notes from the previous system,” says Cilliers. “We have achieved this without writing a single line of Visual Basic code.”

And unlike other CRM software, the M-Files system is by its very structure extensible and scalable. Regardless of the number of insurance providers, loss adjustors, or suppliers added to the project, managers can still store and retrieve documents according to these categories. Beech Builders could also capture all incoming and outgoing emails in one central location, searchable through the M-Files vault. Correspondence no longer gets spread out into multiple personal archives and local Outlook systems.

“In addition to using M-Files for classic CRM functions, we also manage the workflow and documents associated with ad hoc internal initiatives, marketing campaigns, as well as all our accounting and payroll reports. The adaptability of M-Files provides a platform to do many things many different ways. You can manage the entire business document flow from one source.”

A comprehensive and flexible method of workflow management

Cilliers turned the switch off on the old ACT contact management system midway through 2009 and is now using M-Files throughout the company fulltime with very encouraging results. "The stability and response time in M-Files is significantly better than we have experienced with ACT in the past.

"Users are getting used to the new way of working, and we're figuring out how to adapt more and more of our workflow through the file management system," says Cilliers. "They're constantly exploring the flexible custom views of data and adapting it for new tasks.

"The unique flexibility M-files provide means that we can initiate, plan, execute and monitor any business function quickly and effectively, without changing the system," says Business Development Director Elbrie de Kock. "During this growth period of our company, M-files is the engine that drives our growth, and nothing needs to be set in stone. We can test, explore and change things from one day to the next without any impact on the overall processes of the business."

Beech Builders have big plans for expanding the use of M-files in the future. Cilliers wants to continue to refine workflow by adding customized tags and then create portfolios of responsibility for each of his work teams. He also sees the potential for an online customer service centre powered by M-Files, giving customers direct web access to project status information.

"M-Files is at the heart in our business. It is by far our most important system," he says. "I have invested an extraordinary amount of time to seek out a better CRM/DM system and match it up to our particular requirements. M-Files stands out as the optimal solution. To date, the investment in time and effort is paying off."

About Beech Builders

Beech Builders is a recognized insurance-approved contractor in the South of England covering Hampshire, parts of Surrey, Berkshire and West Sussex. Beech Builders specializes in quick and reliable insurance property repairs for damages through fire, storm, escape of water or accident perils. For more information, please visit: www.beechbuilders.co.uk.