

MITCHELL EDWARDS CASE STUDY

Mitchell Edwards is a firm of Chartered Certified Accountants based in Edinburgh offering accounts, taxation and business advisory and support services. Established in 1995, they continue to build on their reputation for providing excellent advice and first class service to their business and personal clients alike.



ANALYSIS

Mitchell Edwards had a manual filing system where every document needed to be filed or retrieved by hand. This was very labour intensive to maintain. With files stored throughout the office - on desks, in folders and filing cabinets - it could be very difficult and time consuming to find the document that was required. An admin assistant could spend whole days just filing documents.

Mitchell Edwards wanted to find a more secure and efficient way to manage their client documentation that would grow with the business.

YourDMS SOLUTION

The implementation of an Invu Document Management system would solve the document storage and filing challenges that Mitchell Edwards were facing.

All client documents would be securely stored, as digital files with indexes, in one central repository. Invu provides a variety of intelligent search options to make finding and retrieving the right documents a quick and easy process.

“Using the Invu system to manage our clients’ paperwork has made it so much easier to find the files we need quickly, which has saved us a lot of time. Now staff can focus their time on tasks that are generating money for the business instead of filing documents.”

Mark Edwards
DIRECTOR AT MITCHELL EDWARDS

Mitchell Edwards client files contain sensitive financial information, so it is paramount that files could be managed and stored securely and compliantly. User permissions can be set for each document to ensure only the correct members of staff can open and edit it. In addition, an audit trail will be created to show who has performed which action on which document.

Ensuring a smooth transition from a manual, paper based filing structure to an electronic system required thorough preparation, thought and planning. It would also be important that all employees who would be using the new system were on board with the changes if the project was going to be successful.

Managing client emails

Once Mitchell Edwards could see the benefits of using technology to manage client documents they were keen to explore other solutions that could help improve productivity and customer service.

They wanted to record all client communication via email, and felt this was essential to the smooth running of the business. An Email Capture solution was added to automatically capture specified emails and store them in Invu, where they can be easily searched for when needed. If one of the team is out of the office, a colleague can find all of the information they need to deal with the client enquiry.

“When we need help from the support team it’s normally for things like upgrading to the latest version of Invu. YourDMS always act on things quickly with minimal disruption to our work, which is great.”

Mark Edwards
DIRECTOR AT MITCHELL EDWARDS

RESULT

All client documentation within the business is now stored in the Invu Document Management system. This has made a big difference to the business, saving the team a lot of time by eliminating physical filing. Invu’s powerful search functions allow staff to find, open an electronic file and see all the information they need in seconds, improving efficiency across the business. Staff can focus their attention on tasks that generate money for the business rather than dealing with admin.

The Email Capture solution has enabled Mitchell Edwards to improve their customer service. When a client queries something, one of the team can find and review the original email and respond straight away.

Invu has become an integral part of the business and is used by 14 members of the Mitchell Edwards team.

The implementation of Invu Document Management and Email Capture has helped Mitchell Edwards to save time, reduce costs and future-proof their business with an efficient, reliable, and scalable solution that will adapt and grow with their changing business needs.

