

BROOK CORPORATE DEVELOPMENTS CASE STUDY

Brook Corporate Developments are a leading business improvement consultancy, offering a sounding board for new ideas and challenging the thoughts of organisations decision-makers, to help staff grow and develop.

Based in Yorkshire, they help local businesses access financial support towards consultancy costs through funding partners. Since 2011, they have supported over 1500 local businesses, providing bespoke solutions, consultancy and training requirements.



“The plan was always to automate and integrate our processes. When the plan would come to fruition and who we would work with was dependent on growth, time scales, projects and finding the right technology partner.”

Dominic Brook
MD AT BROOK CORPORATE DEVELOPMENTS

ANALYSIS

When Managing Director, Dominic Brook, joined the family business three years ago, he had plans to digitise their processes. The actual physical plan was formulated at three o'clock in the morning on the Notes section on his iPhone.

Brook's current processes were manual with a lot of human interaction required, which was impacting their productivity.

The two processes they wanted to focus on were:

1. Consultant Invoices
2. Project Management & Project Documentation

The existing process required consultants to email their invoices to the Finance Manager who would add the Purchase Order (PO) number and type the invoice details into Sage.

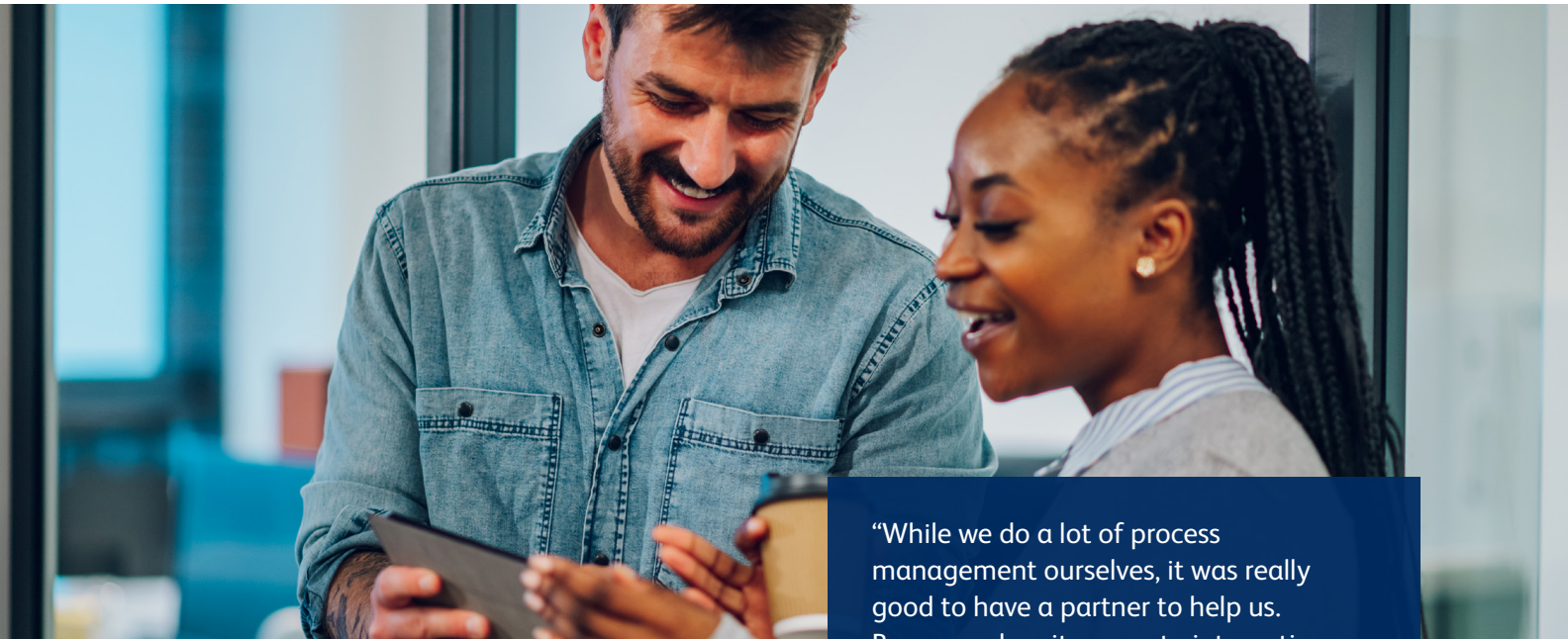
Project Documentation was recorded in word documents which contained required fields to collect data from consultants. Both of these processes were time consuming to complete which could delay payments to consultants on completion of a project.

As they grew, they knew they needed to invest in digitisation, automation and integrating their systems. They wanted to reduce the time spent on non value added activities. Dominic didn't want an 'off the shelf' product, he wanted something that would fit their requirements and work how the business needed it to. He also wanted ongoing support for the systems and processes in the future.

Dominic wanted to build a partnership with a forward thinking company that aligned with Brook's business values and business direction. YourDMS was a perfect fit.

YourDMS SOLUTION

To help Brook streamline the way they work, YourDMS started by reviewing their current processes and removing any unnecessary steps. Then they implemented a Document Management (DM) system and a Client Document Portal. They set up smart workflows and integrated the DM system with Sage and the Portal.



To manage incoming consultant invoices, the process was changed so that consultants included a PO number. When an invoice is checked and verified, if the information matches what Brook has on their system, for example, it has the correct PO number, it can be automatically imported into Sage, removing the need for manual data entry. All invoices are also stored in the DM system.

The process of collecting project reports and documentation is now handled in the Client Document Portal, which is integrated in to Brook's website. The Brook team upload interactive pdfs to the Portal and share with consultants. The consultants log in and complete the pdfs. This triggers a notification to the relevant customer who can then log in and digitally sign off the project. YourDMS worked closely with the team to simplify the pdfs while ensuring essential information would still be collected.

Project documents are stored securely in the Portal where they can easily be accessed by the Brook team, clients and consultants.

Dominic knew how important it was to get the whole team involved with the project and for them to take ownership of it. He needed his team, consultants and clients to embrace the new way of working.

RESULT

Digitising and automating their processes has been a huge success. Using the DM system and Portal has given Brook complete control and visibility of their processes and business.

Streamlining invoice processing has resulted in a time saving of around 60%, which has allowed the business to focus on value added activities and growth. When

"While we do a lot of process management ourselves, it was really good to have a partner to help us. Because when it comes to integration with a bespoke system, that extra 10% of specialist knowledge allowed us to make the right changes. And we're really thankful for it."

Dominic Brook
MD AT BROOK CORPORATE DEVELOPMENTS

they first engaged with YourDMS they had a turnover of £500k+. Now their turnover is around £1.2m. The project had benefited them by saving time, allowing them to increase the amount of work they can undertake while improving the level of engagement with consultants and clients.

"This digital transformation project has given us the platform to increase our turnover. We have been able to show case how innovative and forward thinking we are - we're a business who does things differently!"
comments Dominic.

Simplifying the project documentation forms has made them quicker and easier for consultants to complete. The Portal has connected their team, their consultants, and their customers. Integrating it on the website has resulted an increase in web traffic of 89% and increased brand awareness.

Storing project documentation, and other business documents such as HR, finance, policies and emails in their DM system gives the business piece of mind that all documents are secure and easily accessible to the relevant people. It also gives the team full traceability and understanding of what needs to happen and when.

This scalable solution will support Brook's future expansion and revenue growth while minimising increases in operational costs.

