

## CASE STUDY: D&G Block Management

D&G Block Management (D&GBM) has been providing specialist UK block management services across central, west and south-west London to residential blocks of flats for over 25 years.

Based in Victoria SW1, D&GBM manage over 5,000 flats across 150 buildings, principally in central London, which invoices over £34 million in service charges and ground rent every year. Members of both ARMA and RICS, D&G Block Management provide a comprehensive management service.



Due to the nature of D&G BM's business, they are responsible for handling and processing huge quantities of financial documents relating to numerous properties across London.





## The Challenge

All of this information arrived at their head office in London in both digital and paper formats. Once this had been received, it needed to be opened, read, understood and allocated to the relevant team or person for reconciliation. This process took a long time and in itself generated large volumes of paperwork.

As part of the approval process, all relevant data from these documents needed to be manually entered into the property management system, Qube. Upon completion all paperwork generated needed to be collated, boxed up and archived.

## The Solution

In order to fully understand how D&GBM's operations, Charterhouse conducted a series of audits of both their systems and processes with key stakeholders.

Charterhouse used this understanding to design and implement a bespoke invoice processing system to address their specific challenges.

This project was split into two phases in order to facilitate a smooth and controlled implementation. The first phase focused on digitising D&GBM's invoice processing workflows.

The second phase centered on their historic data with the aim of centralising it in the new document management system.







## The Solution

The new invoice processing system implemented by Charterhouse enables the automatic ingestion of the data from invoices which ever format they arrive into the business.

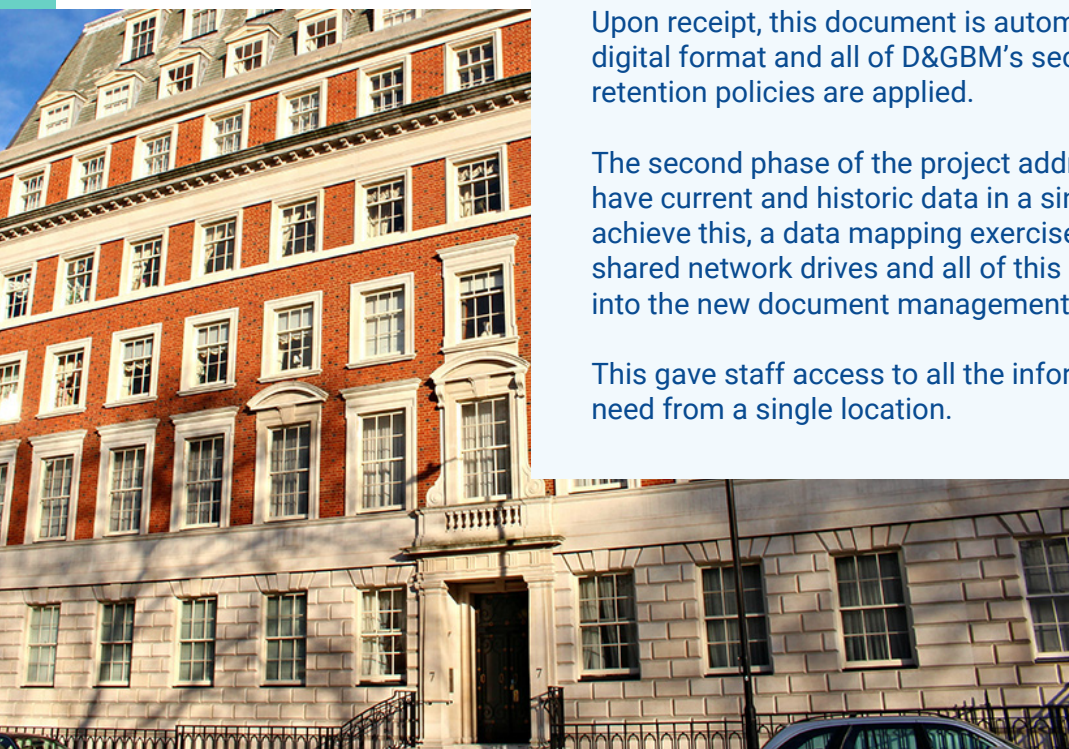
The system then extracts the data from these paper or digital documents and subsequently assigns them to the appropriate property manager for coding and approval.

When the document has been approved by all relevant parties and all the financial checks have been carried out by the system, it sends it for ratification and payment.

Upon receipt, this document is automatically archived in a digital format and all of D&GBM's security and document retention policies are applied.

The second phase of the project addressed D&GBM's desire to have current and historic data in a single location. In order to achieve this, a data mapping exercise was conducted on their shared network drives and all of this information was imported into the new document management system.

This gave staff access to all the information that they could need from a single location.





## The benefits

In digitising their paper based processes this project delivered multiple benefits, which addressed D&GBM's key challenges as defined in the scoping phase. In addition to this there were numerous other benefits which came to light once the system was implemented.



- Improve speed of process for queries, complaints and rejections
- Automate the Financial approval process
- Speed up processes and increase efficiency
- Fully integrated digital system to remove the need for manual data entry and improves accuracy of information
- Increase security and control over valuable and commercially sensitive data
- Makes the annual auditing process easier
- Reduction of spend on printing, copying and paper
- Lowered document archiving costs

*"We're pleased that we attended the Charterhouse invoice processing and document management event as it helped us understand how we could evolve our business operations. During this transition Charterhouse have been a valued partner and source of expertise on how to truly transform our business and streamline our processes to help us improve our operations. "*

**Calum Watson, Managing Director, D&G Block Management**



## About Charterhouse Voice & Data

Established in 1993, Charterhouse Voice & Data is an independent, multi-award winning provider of voice, video, mobile, data connectivity and managed documents solutions and services. Our highly skilled experts create bespoke solutions that help business reduce cost, improve processes and enhance user experience.

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