

PJ Livesey Case Study

Specialist Property Developer Achieves Better Sales Performance and Management with MS Sharepoint

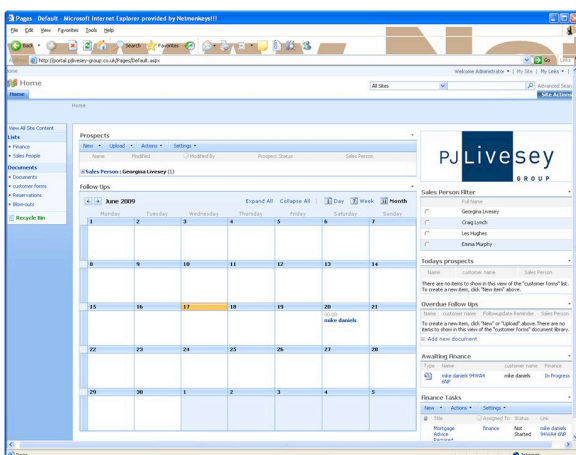
Summary

PJ Livesey has many different property developments on the market at any time. Each development has a sales office where customers who walk in, register their interest and obtain information on the properties for sale.

The company was concerned that these sales leads were not being properly managed and followed up, and there was no robust IT system in place to manage this in an efficient way. Furthermore, the company managers did not have ready access to sales data from the different sites to know what the full situation was.

PJ Livesey also has wider Information Management requirements and did not want a silo, standalone system.

NetMonkeys analysed PJ Livesey's requirements and developed and implemented a Microsoft SharePoint solution that used intelligent InfoPath forms to gather initial information, build up customer profiles in a database, and ensure that finance applications were also managed with workflow.



The solution means that all follow up actions are now properly undertaken and that management have clear visibility of the overall status of leads.



Solution Overview

Organization Size
70 employees

Organization Profile
For almost 30 years the P J Livesey Group has been at the forefront of specialist property development and restoration.. The company was founded in 1979 and has built a reputation through the painstaking renovation of some of the finest period properties in the country.

Business Situation
The company sales team needed more visibility of visitors to sales offices, and needed much better management and progression of sales leads and finance applications.

Solution
PJ Livesey engaged NetMonkeys to develop and implement a sales portal based on Microsoft Sharepoint. Usage of Forms and workflow were at the heart of the solution

- Benefits**
- Better management control
 - More efficiency with managing sales leads
 - More sales conversions

- Software and Services**
- Microsoft Office SharePoint Server 2007
 - InfoPath forms
 - Full analysis to go-live services from NetMonkeys



Company profile

For almost 30 years the P J Livesey Group has been at the forefront of specialist property development and restoration, taking an uncompromising approach that puts quality first every time. The company was founded in 1979 and we have built our reputation through the painstaking renovation of some of the finest period properties in the country. Projects such as High Lawn, Bostock Hall, Wyfold Court and Ingress Abbey won immediate acclaim and have given the company a secure foundation for expansion.

Business situation

In an ever more competitive housing market, PJ Livesey wanted to maximise sales and better deploy sales resource through usage of Information Management.

The company felt that potential buyers were not properly followed up with the result being that sales were reduced. Importantly, management were unsure of the situation as they had little information from which to produce reports

Whilst the information gathered needed to be forms based, PJ Livesey wanted forms that needed very little IT literacy to fill them in. They also required intelligence building in them to automatically trigger follow up actions.

Technical situation

PJ Livesey has good connectivity from site offices, but required a browser based solution so that new sites could then be setup more easily.

Solution

NetMonkeys considered a CRM system. However, PJ Livesey's requirements did not require a full-blown CRM solution. In fact, the key requirements of something easy to use and browser based lead NetMonkeys to propose a solution based on SharePoint which could be implemented and configured very quickly at a low cost. This had the added benefits that PJ Livesey also has a larger and longer term requirement to better manage other corporate documents and data which SharePoint can provide.

NetMonkeys undertook an intensive period of prototyping to ensure that the end user experience was exactly right and would be able to be used by the staff involved.

The solution is based around an InfoPath form, which has different sections completed during the sales process, and by different disciplines (sales, finance etc)

At each stage of the form process tasks are produced and automatically assigned to people. For example, if the customer is interested in a mortgage, a task is automatically assigned to the financial advisor.

If a lead becomes dormant a call reminder is set up for three months time.

Because the forms are integrated with SharePoint all the data contained within them are stored in the SharePoint database and used for management reports.

Management reports are automatically made available in Excel spreadsheets, so that managers can perform more detailed analysis.

Benefits

- Better management control – managers are able to produce a series of reports such as the number of first time buyer enquiries on a specific site, etc
- More efficiency with managing sales leads – sales teams in the sites can concentrate on selling as the system automatically adds diary entries, notifies other departments and reduces the need for paperwork
- More sales conversions – customers are tracked and called in a methodical manner, ensuring that potential sales are not lost
- Introduction of SharePoint for future management of other information

Products and services your company used

- Microsoft Office SharePoint Server 2007
- InfoPath forms
- Full analysis to go-live services from NetMonkeys, including design, development, training and post implementation support

About NetMonkeys

NetMonkeys Information Management team provide a complete end-to-end service from planning through to implementation and support of Information Management platforms. Platforms that leverage your existing investments and incrementally add new "best practice" components in a robust framework that will revolutionise the way your staff work:

- vast information management experience
- Core team members with proven leadership in flagship UK projects
- A wealth of vital best practice expertise
- Reference sites and case studies
- Our customer philosophy

See www.netmonkeys.co.uk for more information

We Build On Microsoft Sharepoint

Microsoft Sharepoint is the fastest selling IT system ever. It is a complete, robust, easy to install information management platform that combines document management, internet/intranet site management, collaboration, business intelligence and reporting and project management. It is a future-proof system that customers can have full confidence will provide the foundations for the work that we do. We have unmatched experience from our own customers and the work our staff have done on flagship corporate rollouts. We really understand SharePoint