

Delivering year on year cost savings whilst continuously improving back office services



Intelligent Office began working with Martin Currie, a leading fund manager in September 2003. Martin Currie is a specialist investment management business, with a head office in Edinburgh and client service offices in London, Zurich, New York, Shanghai, Singapore and Melbourne.

Martin Currie manages £12 billion in active equity portfolios for clients around the world. With a vibrant and entrepreneurial culture they are a self-styled 'big boutique', blending the best attributes of both large and small investment managers, enabling them to react quickly and effectively to the needs of their clients.

Intelligent Office began delivering document management, hospitality and office services to Martin Currie following the completion of a detailed review of the firm's existing support provision. Intelligent Office's key objectives were to improve service levels delivered to internal and external customers, whilst also improving the overall management of support services to ensure optimal value, including in areas of third party spend.

Since 2003 our relationship and the range of services and value that we have added to the firm has increased considerably, making us a key partner.

Service

At the outset of the contract, the transferring staff delivered the following limited range of services:

- Incoming and outgoing mail and couriers
- Archiving
- Hospitality
- Cleaners management
- Envelope fills

Within the first year of the contract and with the existing staff levels, we introduced the following additional services:

- Central copying and binding services
- Filing
- Unwanted mail processing
- Stationery supply
- Equipment procurement
- Business card scanning
- Quality check of externally printed client reports

This significant increase in service delivery, both in range as well as in levels of activity have been set against a backdrop of increased customer satisfaction with our services achieving a year on year increase. Client satisfaction is currently 85% and customer satisfaction is 89%. In addition to that, our Account Management Programme also introduced monthly management information reporting, aiding our strategic management of the services.

Efficiency

Since then and through discussion with the client our team has increased by 33%. During this time the levels of activity have increased significantly, including:

- 386% increase in document finishing
- 125% increase in envelope fills
- 69% increase in couriers sent
- 27% increase in tea and coffee bookings
- 112% increase in sandwich lunches

In addition, the following new services have been introduced to the firm:

- Centralised print service
- Scanning and e-filing
- Fulfilling third part literature requests
- AV set ups for meeting rooms from IT department
- Mail merges
- Confidential shredding service
- PDF printing

Value

As well as an increased focus on service and efficiency, delivering financial value has been at the forefront of our minds. During our time with the firm they elected to make the internal senior role of Facilities Director and the responsibilities of this role move to the Intelligent Office team which were absorbed in the structure. This included facilities and health & safety management. The additional responsibilities that came to Intelligent Office with this change include:

- **Property management**

- ✓ 4 UK and 7 international properties
- ✓ Acquisitions, assignments, lease renewals, subtenant management, rent reviews, lease negotiations and renewals, rates, insurance, disposals and dilapidations

- **Facilities management**

- ✓ PPM and ad hoc maintenance, refurbishments, space planning, office moves, churn, annual contractor reviews, utilities, security pass supply, furniture supply, fixed asset reporting

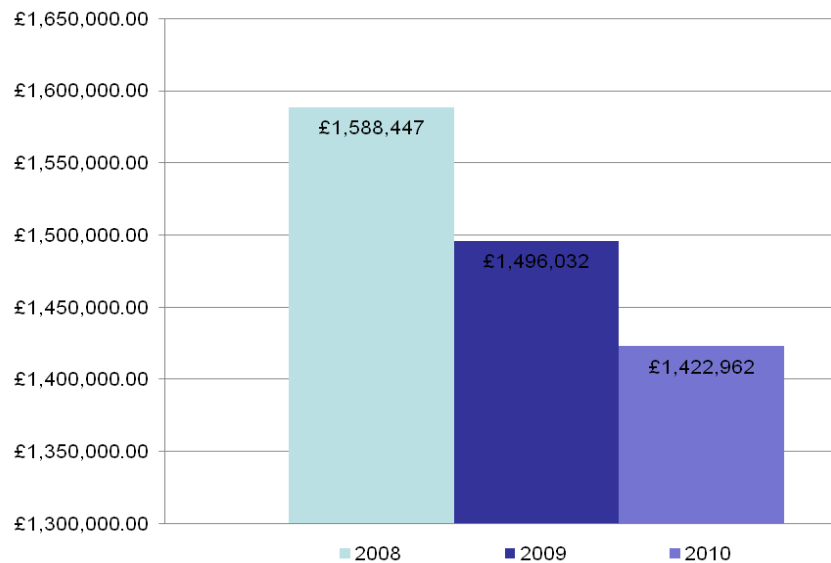
- **Health and safety**

- ✓ Ensuring legislative compliance, risk assessments, staff inductions, DSE assessments, weekly walkrounds, first aid and fire procedures, record keeping

- **Property, facilities, health & safety and office services budget**

- ✓ Forecast and variance report
- ✓ Plan and implement initiatives
- ✓ Focus and report on cost saving

The table below shows the decrease in facilities spend over the past three years, achieved while the square footage remained at 33,400sft and the client's headcount remained constant.



Martin Currie's Finance Director, Ralph Campbell, made the following comment about the firm's relationship with Intelligent Office:

“Having worked with Intelligent Office for over seven years the relationship is one of true partnership. We hold the Intelligent Office relationship up as a shining example of how outsourcing can add value to our organisation. Throughout the contract term they have continually improved service, identified ways to cut costs and continuously looked at how processes can be improved to drive efficiency. Intelligent Office's focus on best practice, client satisfaction and cost management, has made them a key component in the success of Martin Currie.”

IntelligentOffice^{UK}

For more information on our range of services, please contact
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