

Case Study



Davidson & Robertson Rural
Edinburgh, Scotland



Niall Milner,
Director

**Efficient Management
Primed for Less Paper**

Scotland's oldest firm of land agents, Davidson & Robertson Rural is by no means in the last century when it comes to IT. Part of Davidson & Robertson Rural's commitment to clients is 'to utilise technology to constantly improve efficiency and service'. This was borne out by the order in June 2013 for Landmark Systems' KEYPrime Property software to work as a networked version from Edinburgh for the five offices in central and southern Scotland and Cumbria.

Director **Niall Milner** has worked in the Lanark office since 2007. Alongside his Estate Management role he has an overseeing brief on the IT system for Davidson & Robertson Rural.

He and fellow Director Charles Reid Thomas invited Nigel Parsons, MD of Landmark, to Edinburgh in 2012 to show them what KEY Property could do. The aim was to centralise and rationalise the mixture of systems used for property management which were reaching the limits of their delivery.

The firm has grown significantly since 2005, and with SharePoint and phone messaging operating from Edinburgh, the Directors were not immune to the idea of using IT centrally. Visibility works well from the individual offices in Edinburgh, Lanark, Castle Douglas, Forfar and Cumbria.

We ran our bookkeeping on Sage and had grazing agreements and other contracts on Microsoft SharePoint, an Office Management Database. Both systems are good for the mainstream activities but lack flexibility for the vagaries of Full Repairing and Insuring Leases, Farm Grazing Agreements and Agricultural Tenancies. We needed something that was pro-active, flexible and had high visibility, allowing access across the board for the administrators, accounts staff and surveyors.

The fact that KEYPrime Property uses a SQL database platform, as SharePoint does, and could be ordered pro-rata to the number of properties and landlords under management worked in its favour. "There was little point in not going straight onto Landmark's flagship KEYPrime Property product to make Davidson & Robertson Rural bang up to date," said Niall Milner.

I had confidence in the new terminal server which we had purchased prior to the install. Our IT consultants in Edinburgh were on hand with Landmark's Technical Team when it came to the July install. We did not experience significant performance drop and the whole operation was pretty painless.



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What was the KEYPrime Property experience like? "The transition took a few months," says Niall Milner. "We ran both the old and the new system in parallel to enable us to verify everything against the existing information. It was a good way of doing it as it was an opportunity to iron out any inconsistencies such as incorrect dates or addresses on the system. KEYPrime Property has made a massive difference to the efficiency of the Property Management service."

Niall Milner is in no doubt that clients benefit from more efficient management: "We can reach Energy Performance Certificates at the click of a button and there are more checks to prevent key action dates slipping through the net." And what next? "We are in the process of addressing our internal broadband infrastructure and educating everyone to put more data into the Terrier to further reduce paper files – no more rifling through files in the loft."

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Major benefits since installing KEYPrime Property:

- Automation of demands and invoices relieving bookkeepers of a manual exercise
- Single stationery location makes changing details on multiple invoices easy
- Surveyors can generate arrears reports independently from any pc
- Management of key dates with 'Diary' brings a new discipline into management
- Creates a system which is standardised across the company
- 'Terrier' tidies up statutory certificates as pdf's against properties within database

