



Using Wisdom to achieve collaboration and savings in an organisation with over a 400 year history

Customer Background

There is no organisation in the world quite like The Crown Estate. With a property portfolio encompassing many of the UK's cityscapes, ancient forests, farms, parkland, coastline and communities, The Crown Estate's role as employer, influencer, manager, guardian, facilitator and revenue creator is unique.

The agency has two main objectives: to benefit the taxpayer by paying the revenue from its assets directly to the Treasury; and to enhance the value of the estate and the income it generates.



The Requirement

The responsibility of managing, protecting and developing the heritage of urban, rural and marine properties in Her Majesty's interests demand the best and most advanced business practices. The Crown Estate needed an Electronic Document and Records Management (EDRM) solution which could face and resolve these challenges by moving from a paper file culture to one of managed electronic files. It was

important that the people using the system would find it easy, quick and convenient and find that previously hard to locate information was now at their fingertips.

The Outcome

"Our Wisdom implementation is straight out of the box with virtually no customisation or integration, yet it continues to deliver an increasing range of solutions across the business. This ranges from health and safety to the management of title deeds for our large and diverse portfolio of properties"

Martin Brazier, Knowledge Manager, The Crown Estate

Wisdom helped to facilitate the successful change from a paper based culture, resulting in decisive cost savings, stronger partnerships and a more efficient, effective and delivery focused organization.

- Files are now stored and found easily
- Wisdom provides the right access to the right information quickly, easily and conveniently.
- Successful change: from a paper based culture to a culture of electronic files
- Stronger, better partnerships
- Decisive cost savings
- More efficient, effective and delivery focused organisation

The Challenge

Changing the culture of storing paper files because “you never know when you might need it” into a trustful attitude towards Electronic Document and Records Management (EDRM) was The Crown Estate’s biggest challenge.

Implementing an EDRM solution does not necessarily mean that employees will be keen to change the way they work. With Wisdom it became clear quickly that the enterprise benefits of the solution are self-evident; not only from a process point of view but also from a people perspective.

Cashable Savings

The Crown Estate’s property portfolio is valued at £6 billion, and until 2006 operated using around 70,000 paper files. Implementing Wisdom has meant that those files are now a dead archive, with Wisdom used as the corporate record. This has opened up new opportunities to deliver improvements to business processes. For example, title deeds can now be accessed in seconds, meaning the organisation can react more quickly to market conditions and can deliver direct savings in legal costs for property transactions.

The Crown Estate’s legal partners and managing agents increasingly use Wisdom too, which they access through the organisation’s extranet, allowing the potential to streamline the entire process start to finish.

Other Benefits

- **Time:** Quick and improved access to information, reduced service time
- **Legal:** Improved legal and regulatory compliance
- **Business:** React quicker to market changes and demands
- **Safety:** Improved health and safety standards:
- **Environmental:** Become greener: Reduce the movement of paper (carbon saving)

Wisdom laid the basis for creating a more efficient, effective and delivery focused organisation which is meeting The Crown Estate’s high standard heritage demands in the quickest and most qualitative way.



Wisdom is an Integrated Information Management solution comprising Electronic Document and Records Management, Workflow and Document Capture.

It provides today’s information intensive organisations in the public sector with an integrated platform for the management of electronic and paper information, enabling:

- Integrated information driven business processes
- Improved, more customer-centric service delivery
- Reduced avoidable contact
- Cashable savings
- Legal and regulatory compliance

Wisdom EDRM provides complete lifecycle management of documents and records, both electronic and paper using a contemporary technology platform that seamlessly and invisibly integrates with line of business systems throughout the organisation. The EDRM module has been accredited by the UK National Archives since 1999 and we are now working towards certification under MoReq2, the new European standard for the management of electronic records.

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