

CASE STUDY: CBRE CZECH REPUBLIC

“SEARCHING FOR CONTRACTS WAS TEDIOUS AND TIME-CONSUMING. AND IT COST LOTS OF MONEY.”

About customer

CBRE

CBRE operates in the field of real estate services and investment, providing the country's widest range of properties, complemented by high-quality services. CBRE employs nearly 400 people and manages over 200 commercial buildings with a total area of more than 1.2 million square meters.

Problems and Objectives

CBRE manages a number of commercial properties with more than 1,500 tenants. This represents a huge collection of documents that need to be processed and archived as well.

Like most companies on the Czech market, CBRE had long relied upon primarily a system of paper documents and material folders. Any digital records, such as email communications or scanned documents, were isolated in individual user folders. Consequently, **gathering related documents and other vital information about invoices, contracts, and audits was a cumbersome and time-consuming manual process.**

Before full digitization, if an account manager brought a new lease, the paper document needed to be channelled through several departments (legal, accounting, etc.) and then be placed in some isolated file folder. Consequently, customer requests for changes to the contract, or any other updates or even minor adjustments, resulted in newly-reprinted documents and a repeat of the paper chase through multiple departments.

Another problem revolved around personnel changes. If, for instance, an account manager or project manager changes positions, it is important to forward all related documentation and correspondence as quickly as possible.

In addition, all documentation needs to be updated accurately and properly archived in the case of an audit check. Again, processing and archiving these changes via paper-based documentation is time-consuming, expensive, and is subject to errors and/or omissions.

The key objective for Exon was to digitize the entire process in order to make archiving and updating documents instantaneous and accurate across all departments.

This would also streamline searches for commercial contracts and their amendments, making it possible to access data of any kind easily and instantaneously.



Solution

CBRE, in cooperation with the supplier company EXON s.r.o., implemented the electronic document management system (DMS) ELOenterprise.

ELO's priority function is to store and archive business documents with the following basic functions and features:

- Unified secure archive
- Instant search according to defined criteria or full text
- Access rights for individual employees
- Saving all versions and revision information (who, when and how) for contract changes
- All email communication with the customer (including internal communication) is archived in ELO
- All business case information is available immediately

CBRE also uses document management system to approve business workflows and process received invoices. The user has the possibility to approve the given contract directly in the ELO environment, including the registration of deadlines. **Through their cooperation with Exon and its partner ELO, CBRE now has a fully-digitized archival system, making their processing, updating, storage and retrieval of vital data more uniform, efficient, and safe.**

EXON s.r.o.

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