

# Case Study



## Background

Robinson Low Francis (RLF) is a construction and property consultancy with multiple offices across the UK and Malta. Established over 125 years ago, Robinson Low Francis has grown through a series of mergers and acquisitions and has a wealth of experience in areas such as quantity surveying, project management, building surveying, health and safety, management and development consultancy.

## Problem

As RLF expanded, the need for centralised, well managed project information became increasingly apparent. Searching various locations for information and creating project documents was taking up time that could be better spent developing the business. RLF wanted to remove the reliance on slow links to different information stores and set about searching for a document management system. The main objective was for a system that would draw together contact details and information in a central project database for use in standard templates.

## Solution

A search of the marketplace revealed various document management systems, but on discovery of Union Square for AEC Professionals it was immediately obvious that it offered a cheaper and less risky solution. The system offers a managed approach to contact, enquiry, project and document management, with one centralised database accessible from all areas of the business.

As Union Square can be tailored to individual organisations, the system was ideal for ensuring the needs of all departments were met. Following a demonstration, these departments were keen to suggest additional features and system modifications and a final configuration was agreed. After the initial roll out RLF integrated its accounting ledgers with Union Square for improved visibility of the financial performance of projects, as well as increased efficiency through the timesheet collection and reporting cycle.

### Company

Robinson Low Francis LLP

### Business

Construction Consultant

### Number of staff

130

### Solution

Union Square for AEC Professionals

“The creation of documents was wasting time that could be better spent developing the business.”

**UNION SQUARE**  
FOR AEC PROFESSIONALS

## Implementation

The decision to implement Union Square meant a considerable amount of change for staff. Good communication was deemed key to a successful launch so an internal marketing plan was devised and delivered to highlight the system's benefits. In the weeks building up to the launch, a gradual stream of information was provided to employees with the aim of increasing interest in the system and engaging staff. Robinson Low Francis even opted to invest time in a company-wide roadshow to give a taste of what was to come before individual training took place.



Champion users were appointed to advise their colleagues on how to get the most out of the system and to become a point of contact for any queries. Preparing these advisors for their new role was central to the eventual success of the project. As well as system training they received personal coaching and weekly telephone sessions to keep them motivated and prepared for their new high profile role within the business.

The launch itself was high impact and every member of staff received a pack of informative collateral and attended an introductory session.

## Benefits

Benefits Robinson Low Francis have realised to date include:

- **Increased efficiency** – time is saved searching for project details, documents and business contacts with this new central point for all knowledge sharing.
- **Improved infrastructure for remote working** – staff can access the system remotely from home, on site or from other offices. This allows staff to respond quickly when out and about and ensures the latest version of documents are being accessed from all locations.
- **Improved visibility of project financials** – RLF can monitor the profitability of individual projects in real time thanks to the integration with its accounts system. This has removed the lengthy process of collating spreadsheets and means project financials are always up to date. This allows project managers to take corrective action before it's too late.

## A Q&A with Neil Cannon, Head of ICT

### How have things moved on since the original Union Square implementation?

We've integrated with our accounts system so projects are now automatically synchronised and linked to our clients for invoicing. Project finance data is visible to all. Our timesheets are also integrated, saving us further time.



### Are there any new ways of working?

Union Square allows us to spread project workloads between offices more easily than before, so we can be more efficient. We can also be more flexible with home working now that employees can access the information they need from anywhere.

### What challenges did you face along the way?

The main challenge is still training and trying to stop people getting into bad habits, i.e. saving information in the wrong place. That kind of thing is always going to be something to work on.

### What was the main reason for choosing Union Square over other products?

There wasn't really anything else that could do what Union Square does. The fact that all of our information is stored in one place on our servers is a key benefit and the system was also much better value than all the other alternatives.

“It was immediately obvious that Union Square offered a cheaper and less risky solution.”

Contact us for more information on all our product offerings and how we can help transform your approach.

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