



CASE STUDY

A Single Virtual Office: iManage WorkSite Streamlines the Deal Process at CapMan

CapMan were looking to develop documentation processes across their five offices and 150 staff. The requirement was to streamline the business, boost efficiency and facilitate collaboration. In their search for the right solution CapMan turned to industry colleagues who recommended iManage WorkSite. iManage WorkSite interfaces with Outlook and MS Office. iManage WorkSite implemented by Ascertus was the obvious choice due to a level of understanding of the business and willingness to provide the necessary integrations.

CapMan successfully implemented iManage WorkSite to staff based at offices in Helsinki, Stockholm, Copenhagen, Oslo and Moscow.

CapMan is one of the leading alternative asset managers in the Nordic countries and Russia and manages funds with approximately €3.6 billion in total capital. CapMan's operations are divided into two business areas, CapMan Private Equity and CapMan Real Estate. The B shares of CapMan Plc are listed on the Helsinki Stock Exchange and have been since 2001.

CapMan



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Each office had developed its own methodology for organising the documentation associated with the deal process and fund management. 'Cross-office teams work on several deals simultaneously, so a Helsinki partner working on a Stockholm led deal would be working with documents that were organised in an unfamiliar way' explains IT Program Manager, Simo Syrjänen. Furthermore, the network folders for each deal were difficult to find and did not include e-mails. This led to problems including duplication and access. Everyone party to an e-mail exchange would retain copies of documents and colleagues could not access each other's e-mail. There were also variations in style and formatting.

Why Ascertus?

- Leading provider of software solutions and IT consultancy for Professional Services Firms
- Autonomy iManage Partner
- A team of experienced and highly qualified professionals

"WorkSite has transformed CapMan into a single virtual office, boosting consistency, productivity and client service."
Simo Syrjänen, IT Program Manager, CapMan

iManage WorkSite Delivers a way to a Consistent Documentation Process

Syrjänen states "WorkSite has provided a number of significant benefits including enforcing a standardised way of working and collecting data for investment cases and funds. Rights management has been simplified through the use of templates. When new deals are set-up, security rights are applied automatically to the folders, documents and e-mails, ensuring that only people with the correct level of access can view and amend information. While working with sensitive information, we need to provide correct access levels for management, investment professionals and different service teams.

Now when documents are distributed internally they are sent via e-mail including links to a single instance, this ensures there is no confusion and everyone is working on the most up to date version"

He also believes that WorkSite's powerful search capabilities has reduced the time that it takes to search for information, rather than the traditional method of browsing through large network folders.

"The 'my workspaces and favourites' – functionality has been widely used. From within Outlook they can quickly view their own current cases. It is very important that everyone stores documents to the system. People can now find the right workspace and documents from the supposed locations and across the organisation we now have complete trust in the content, something which is core to successful document management usage. The system has also been integrated with the firms Intranet which allows the same information to be viewed from different locations, but exist only once"

So what about the future, well Syrjänen would like to link WorkSite to their ERP system to automate the case inception process and he would like to extend the search capability to include SharePoint and external content providers, both projects that WorkSite supports and Ascertus will be working on shortly.

CapMan

