



# CKD Galbraith - Property Consultants

## Who is The CKD Galbraith

Formed through the merger of CKD Finlayson Hughes and Cluttons (Scotland) CKD Galbraith provides a full range of property consultancy services across the commercial, residential and rural sectors throughout Scotland.

## The mission

- Monitor operational activities more accurately
- Improve business visibility - better forecasting, tracking of targets & better reporting.
- Locate a system that was easy to enter information and easy to take it out
- The System had to integrate with Sage MMS Financials.

## The solution

Implement the **Corporate** edition of Timewatch's **time®** Time Recording and Billing Solution and integrate it with Sage MMS

## The results

- More precise invoicing enables CKD Galbraith to give cost breakdowns to clients
- Ease of use means that all time is logged and the company is confident that it is not undercharging for time spent on client projects.
- CKD Galbraith can bid for new business more accurately.
- The link between **time®** and Sage has eliminated double entry of data, inaccuracy and delay

## TIMEWATCH CUSTOMER CASE STUDY

### Customer Summary

*"With **time**® we now run our business in a much more structured way."*

**Doreen Richmond**, Partnership Secretary, CKD Galbraith .

CKD Galbraith is the result of a merger between two long established firms specialising in estate agency and chartered surveying. Much of the company's work is in the management and letting of property, particular on rural estates.

The company had professional staff working on different projects for various clients but for a long time it did not have a method of logging it. CKD had tried a module within Sage and also manual timesheets but found neither method satisfactory. *"The company was growing and it got to the point where we felt that we had to know more about what we were doing"* said Doreen Richmond, Partnership Secretary. *"Many clients pay a set fee per annum but we had no idea if we were providing a good service or giving our time away. It was particularly difficult trying to analyse our business."*

The company decided to start looking for a time logging system. CKD Galbraith had two main requirements: it had to be easy to enter information into the system and easy to take it out. The partners began by asking other professional practices for advice and in this way they heard of **time**® from Timewatch plc.

The company initially bought a 30 employee **time**® License which including **centraltime**™, the Administration, Billing and Reporting Server and **personaltime**™, the end user timesheet entry system. Everyone in every department began using it so that it would be possible to gain a picture of what all members of staff were doing for the company's huge range of clients.

The benefits were immediately apparent. *"We are much better at estimating fees which means we have much more accurate invoicing"* said Doreen Richmond. When it comes to the point of reviewing invoices CKD Galbraith can see exactly how

members of staff spent their time and can give clients a cost breakdown. *"It is much easier to justify our charges because we can show precisely what we are doing. We can immediately see when we are undercharging, something we would have missed before. We also know that when we bid for new business, frequently in competition with other companies, we are more accurate."*

User feedback was very positive. *"personaltime*™ is so easy to use; partly because individuals only get jobs allocated to them so they do not have to look through other jobs on the system" commented Doreen. *"Expenses were done manually before and now they are entered directly into client accounts"*.

Overall the company has more visibility on its business. As Doreen Richmond observed *"We can track targets, forecasting is more reliable and we have a clearer idea of where going. We can see where individuals spend their time and review what they are doing if necessary. We can organise things more sensibly, for example we can pass work from a surveyor to an administrator."*

One of the reasons that CKD Galbraith chose **time**® was the link between **time**® and **Sage-MMS**, which the company uses as its accounting package.

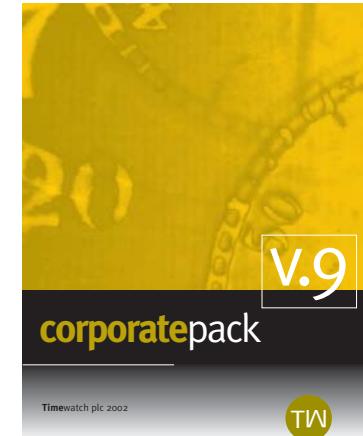
Previously invoices were typed, then manually entered into Sage where a job number had to be set up. There was inevitable inconsistency in the way that jobs were allocated to the nominal ledger and there was scope for error in the transfer of data from one system to another. There was also a delay between the time that draft invoices were first produced and final invoices were entered into Sage. Now that there is no need for double entry one person in the Ayr office produces draft invoices for three offices. Sage is always up to date.

Importantly, there is now a structured and consistent sequence from jobs being raised right through to invoicing. When a job is first entered a nominal ledger code is assigned by a manager, which avoids any later doubt about how a job should be coded. Data is entered by employees into **personaltime**™, the posted into **centraltime**™.

The company runs regular reports to show such breakdowns such as time and expenses spent on each client account. Doreen Richmond recognises that **time**® holds a huge quantity of data. *"We can see how much each client paid in the last year, work done, profitability etc. and with a large number of Clients, from very small to very large, this is very important to us.. Timewatch is training us to write our own reports so that we can create them whenever we want. I would for example like to show the comparative importance of different clients. Sometimes a client that pays a small management fee actually gives us a lot of one-off work which we may not always be fully aware of."*

One additional benefit is that **time**® helps Doreen Richmond provide accurate information for the company's professional indemnity insurers. Some activities, for example valuations, require a higher level of insurance and because every job has details attached, CKD Galbraith can show each activity as a percentage of total work. *"Whereas these figures had been estimated before, analysis is now speedy and correct. An added bonus is that these figures help us to identify potential new areas of activity in different locations"* said Doreen Richmond.

As the company has grown the number of user licences has increased to 100 and CKD Galbraith is now planning to roll out **time**® to all its offices. *"We know it will make a huge difference"* said Doreen Richmond. *"If you want to do something specific for your business you cannot buy off shelf. One of the great things about **time**® is that it can be tailored to suit any organisation. We are still developing it to help us get the maximum out of our business. It is becoming even more useful as I continue to gain more information out of it."*



### Product Summary

The CKD Galbraith implemented a Corporate edition of the **time**® Time Recording and Billing Solution integrated with **Sage-MMS** with end user timesheet entry via **personaltime**™.

The entire solution is based on SQL Server 2000 and is fully integrated with the **Sage-MMS** from Sage.