



NM Rothschild & Sons Ltd

Improving financial and operational planning with CAFM Explorer

The challenge: Gaining a clearer view of financial and operational activities

While this blue chip city bank has an unparalleled number of offices worldwide, its facilities function remained relatively basic. There was little coordination with any of Rothschild's other FM services or systems – making collaboration across the business difficult – and the Helpdesk comprised a manned phone, which relied on the experience of staff to prioritise calls.

With an increasing maintenance backlog and a greater need for in-depth reporting capabilities relating to delivery, customer satisfaction and expenditure, Rothschild's needed a more sophisticated solution that would help it increase Helpdesk efficiency and achieve tighter control over expenditure.

The solution: Improving customer satisfaction and reducing risk with CAFM Explorer

Following rollout of CAFM Explorer, Rothschild's has an accurate system of logging calls and tracking job completion via the solution's automated Helpdesk. The self-service element means that customers can submit their own maintenance requests, providing a higher level of service as a result. Contractors are also able to use the system to review and manage workloads, streamlining the response process and improving customer satisfaction.

As CAFM Explorer is able to store data relating to the bank's full inventory of assets, all planned preventative maintenance is managed within the system and triggered automatically at the required time – a significant forward planning win for Rothschild, with compliance risks mitigated.

Comprehensive reporting functionality has also been pivotal in enabling the team to access essential management information, with CAFM Explorer's collective purchasing and budget application providing greater visibility of expenditure against budget.

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The outcome: A boost in service levels and complete financial visibility

Rothschild's is able to manage more than 200,000sq.ft. of space successfully thanks to the addition of CAFM Explorer.

The software solution has enabled the bank to demonstrate the savings and efficiencies achieved, with service levels up from 60% to 90% following its implementation.

The team's ability to link work orders, budgets and spend, gives Rothschild a valuable perspective of expenditure against

prediction, and provides a means of alerting the business to excessive demand or under resource early, essential in aiding strategic decision-making and forward planning.

Commenting on the addition of CAFM Explorer, Rothschild's said; "There is no doubt that the automation and streamlining of the Helpdesk has improved the team's efficiency and the accuracy of job requests, the subsequent service delivery and as a result an increase in customer satisfaction levels."

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For more information please call **0870 3337101** or email caf@idoxgroup.com.

Contact us

2nd floor, 1310 Waterside
Arlington Business Park
Theale RG7 4SA

Tel +44 (0) 870 333 7101
Fax +44 (0) 870 333 7131