



Case Study

VisionCPM Commercial Property Manager and Westpac

Bringing Property Clarity to Westpac

When you manage property, whether it's a small site or many multi-levelled office blocks, having up-to-date and accurate information at your fingertips is essential for your business success.

However, getting a system that does all that for you - and integrates with your accounting and other software - isn't as easy as it sounds.

Tim Boyer, Property Manager for Westpac, can sympathise. Though he now has the answers he needs thanks to a solution provided by Vision Software.

"Our previous property system was outdated and with more than 500 properties throughout New Zealand, we needed an excellent property management solution that worked seamlessly with our Oracle financial system."

"We lease all our properties, from ATM machines to branches, all the way up to our head office, so getting the right system was a critical business decision," says Tim. "Vision Software's system provides the clarity of information we require at all levels. VisionCPM gives us access to more capabilities for reporting on and managing our property portfolio.

"It's more efficient and saves a lot of time. We are extracting more accurate reports directly from the system rather than having to work through manual updates."

But it was no 'gimme' for Vision Software, the innovative software development company based in Mount Maunganui. Tim Boyer stresses the very intensive process Westpac subjected the VisionCPM system to over a six-month period.

"We make no apologies for the rigorous testing because as any business person knows, with so much at stake, we had to make sure we got the system that best suited our needs."

The team from Vision set out to get into Tim's and his colleagues' heads.

"Before we begin anything, we run a comprehensive audit of our customer's needs," says Peter McHannigan, Vision Software's project manager for the Westpac implementation.

"Vision prides itself on truly understanding all aspects of each client's business requirements, so we put a lot of emphasis on planning. In Westpac's case this was a two-way process with both our implementation team and Westpac staff fully involved at each stage."

The analysis process can take up to three months, depending on the size of the task. The Vision team visits properties and reviews documentation with the client to make sure both parties understand the success factors.

Peter developed the implementation and documentation processes for VisionCPM, including the Property Portfolio Questionnaire that Vision uses to scope projects and gain a clear understanding of all the tasks.



“The emphasis is on getting this phase right,” says Peter. “It’s vital we understand all of the requirements for the end users, as well as for management. Doing this has delivered great results time and time again.”

Peter says another benefit of the intense research phase is the tailored system delivered for each client.

“In our experience every client is unique with their own specific requirements. Occasionally a client tells us they don’t need this analysis phase because what they do is just ‘stock standard’. But we’ve discovered there’s no such thing as a ‘standard’ property business.

“In every project both we and the client learn new and different things about the business, and off-the-shelf products just don’t deliver our level of specificity.”

In Westpac’s case, the analysis revealed some highly relevant customisations that were then included in the implementation. Staff from Vision and the Westpac IT department worked alongside each other on the implementation and consulted with the end users throughout the project.

Westpac’s Tim Boyer was impressed with Vision Software’s smooth implementation of VisionCPM.

“Vision’s staff worked closely with our Properties Team to ensure the system was installed properly. In an organisation as big as ours that deals with critical information, we had to make sure everything would work once it went live.

Vision created a superb ‘real life’ environment, which allowed us to test the VisionCPM product. This allowed any risks to be identified and managed, and gave us the confidence we needed.”

Peter McHannigan says another critical phase of any implementation is data entry.

“Vision places great importance on managing the data entry process to ensure a good result, and in the end any system stands or falls on the quality of data that’s stored in it. Organisations tend to underestimate the time and focus needed in this area.”

Following the successful roll-out Vision undertook a training project, so that all the end users have a good grounding in how the system works and its benefits.

Vision staff - including product specialists, trainers and testers, developers, a project manager and analysts, were available to Westpac. They spent time at Westpac’s sites in Auckland and Wellington to smooth the development and installation process.

Throughout the project Vision provided Westpac with fortnightly updates to keep everyone informed about how the implementation was progressing.

Whether you have a growing portfolio or an established one, the VisionCPM solution provides the tailored information and systems to successfully manage your property and lease requirements. In Westpac’s case, VisionCPM has provided Westpac with the superior information and tools it needs to track its property portfolio.

“Vision was definitely the best fit with our business requirements”

Tim Boyer, Westpac