

Oxford Properties Group

Customer Success Case Study



Embracing System Modernization for Efficient Document Production

Oxford Properties Group is a global platform for real estate investment, development and management, with over 2,000 employees and close to \$40 billion of real assets that it manages for itself and on behalf of its co-owners and investment partners.

Challenge

When it comes to producing documents, Oxford had some unique challenges. The complexity of their leasing contracts – and the financial impacts of any errors or delays in creating them – was significant.

Highly complex documents such as lease agreements for commercial space in office, retail or industrial properties had to be reviewed by Oxford's team of legal experts. As primary stakeholders of the document workflow, they were responsible for making sure the 60-page lease agreements presented to the lessees were complete and accurate. But the legal team was unable to make even minor modifications to the master lease templates themselves – use of Oxford's legacy document system required a level of technical expertise. Requests for new or modified documents were routed to the IT department. As Oxford programmers were always fully engaged in enterprise-wide technology projects, turnaround time for template composition requests suffered.

Product

- Experlogix Document Automation

Benefits

- 80% reduction of lease document versions
- Reduced dependence on IT resources
- Increased efficiency

Tech

- Microsoft Dynamics 365

Commercial space that sits vacant while lease documents are composed, edited, proofed, and approved resulted in lost revenue for Oxford. Any improvement the company could make in their document management workflow would allow tenants to occupy the space sooner. Oxford made a decision to move away from their legacy document system in favor of Experlogix's modern solutions.

Solution

Non-programming Document Composition

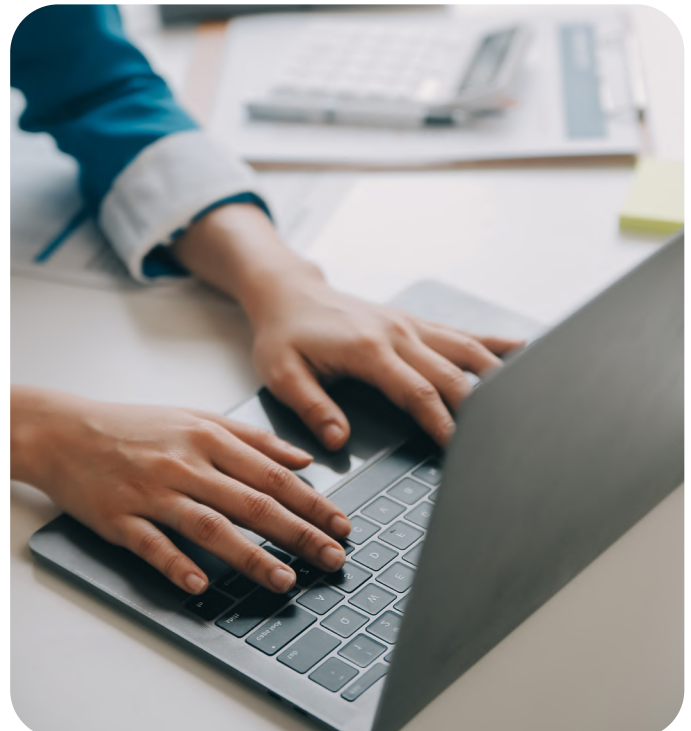
Based on Microsoft Word, Experlogix Document Automation enabled Oxford business users to leverage their experience with Word and be immediately comfortable in creating lease templates, while being assured that all corporate guidelines and regulatory rules were automatically enforced. After a mere two hours of training, they were able to easily provide content and perform template update tasks in this familiar environment, eliminating the reliance on IT resources for document creation.

With administrative-level access and knowledge of their organization's data sources, key Oxford experts defined sophisticated business rules and workflows for the generation of personalized documents. Business users could easily merge specific data and lease components to produce tenant-ready documents, and automatically send these documents to the appropriate stakeholder for review. This accelerated workflow ensured efficient tenant distribution of personalized, accurate and relevant lease documents.

In addition to Experlogix's ease-of-use and familiar environment, the company was able to rationalize the number of lease document templates in use at Oxford. After the move to Experlogix Document Automation was completed, less than 30 templates were necessary to support the retail and office lease business – under the previous document system, Oxford was maintaining over 200 document templates for these business lines – reducing the risk of choosing the wrong template and causing costly delays, while simplifying template management.

Strong Features Solved Unique Challenges

Some tenants leasing space in several Oxfordmanaged properties had negotiated customized terms to use in all their leases. Experlogix Document Automation features allowed Oxford to identify this customized content known as "precedence clauses". The system automatically replaced the standard language in the lease documents for only those tenants to which the clauses applied, saving time, reducing errors, and ensuring continuity.



Other valuable Experlogix Document Automation features were print previews and flexibility in routing print to any available printer. These capabilities were not available in Oxford's legacy document system and caused delays, as proofing could not be accomplished until documents were printed. These time-consuming limitations were eliminated with the Experlogix Document Automation solution.

Result

Moving away from a product that has been in place for some time brings its own set of challenges when it comes to employee training and acceptance. With Experlogix's Microsoft Word interface, this was a non-issue. The Oxford legal expert team was especially pleased that their pre-existing familiarity with Word meant they wouldn't have to learn how to use another document system. Non-technical business users could easily create and modify lease document templates, and efficiently distribute them to tenants without having to rely on IT resources to support the production of these critical documents.

Eliminating unnecessary document templates reduced obsolescence and duplication that could have caused non-compliance errors. The Experlogix team was highly skilled in recognizing opportunities for consolidation – they designed fewer dynamic templates to take the place of many static ones. This streamlined template management and reduced the risk of errors and costly delays, while boosting efficiencies.

The support they received from Experlogix was an important factor in the Oxford team's ability to accomplish their goals with minimal disruption to their ongoing business. And because the initial conversion has progressed so smoothly, Oxford is now looking forward to moving their remaining lines of business to the Experlogix Document Automation platform sooner than anticipated.



“Any organization that utilizes document templates featuring standard wording, variable information and multiple variations would realize the same kinds of benefits that Oxford has enjoyed since deciding to make the switch to Experlogix Document Automation. I wholeheartedly recommend them.”

Susan Wells

Information Technology Director

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