

Cati case study

This international banking and asset management group works across the Channel Islands.

The group manages compliance, among other tasks, remotely from one office where its small facilities team is based. Its offices are spread across the Channel Islands.

About the partnership

Compliance is becoming more complicated, there are increasing requirements, cost constraints limit resource, and the whole topic is evolving. Working across the Channel Islands presents obvious challenges; being in or getting to each office

isn't easy for the small facilities team, and everything is managed remotely.

We have been working in partnership with this banking and asset management group since 2018, delivering our online compliance solution, Cati.

Cati has digitised the group's paper-based compliance tasks, reduced administration time and streamlined and simplified compliance management to give the group a clear understanding of its real time compliance status.

The challenges

As the team is based in one office, on one island, getting documentation controlled from there wasn't straightforward. Remote management has been made much simpler – the team can access Cati at any time, from any device as long as an internet signal is available. Everything is now stored in one online hub, so the team doesn't need to be in one specific office or on the company network to view documentation. With the bespoke access permissions assigned to each individual user, they will only see what they are required to see.

The facilities team is small, meaning that efficiency is a high priority as it has a lot that falls under its remit. Admin time has been reduced as contractors can now upload documentation straight to Cati. If a contractor is slow at getting a job done, Cati's automatic system allows the team to set up chaser emails without having to physically send them out each time. Relevant access can be provided to contractors, who can view documents such



as the asbestos register, before they arrive on site. Certain access rights can also be provided to directors who may want to see progress of their organisation's building compliance.

The team no longer has to send multiple emails when someone asks to see compliance documentation, as access can be provided through Cati and once someone is added, details are automatically emailed to the user.

The results

Cati's flexibility means that the team can add whatever it wants, whether this be lease management that prevents it from missing rent reviews or break clauses, or specific financial compliance. The team is now able to track it all and understand the real time compliance status across the portfolio.

“Cati is so flexible it will work in pretty much every scenario! When I first received our proposal, I was shocked to find out that Cati is in fact a very cost-effective solution. We didn't need an all singing all dancing piece of software, so Cati is the perfect fit.”

Facilities team
International banking and asset management group

