

Remit Case Study: Montagu Evans

How do you turn an obligation into an opportunity? Faced with the need to comply with new ISO 9001 quality standards, Montagu Evans called on Remit for consultancy support. We took this as an opportunity to review and refresh the firm's quality processes, ensuring they were fully up to date with the latest demands on a range of issues including GDPR, bribery and money laundering.

Improving business with new quality standards

Montagu Evans has helped its clients to shape some of the UK's largest commercial, residential and mixed-use property development projects. With a partnership of over 350 people, based in offices from Scotland to London, the firm focuses on housing, retail, business space and the public sector.

Montagu Evans had implemented a Quality Management System based on ISO 9001 for many years. However, from September 2018, the standard was changing to include a greater emphasis on risk management and the role of leadership.



The task: a year to revise processes

With a year to go before the new standard came into operation, Montagu Evans called in Remit to offer consultancy support on this project.

This involved:

- Using the Remit Process Model to identify the scope of the business covered by the new ISO 9001 standard.
- Running workshops to improve and standardise processes.
- Documenting the processes into a new manual.
- Making the transition to the new processes before the deadline in September 2018.

The Remit team: practical people allergic to gobbledegook

Roger Sewell, a Partner at Montagu Evans, explains why the firm brought Remit on board. 'We didn't have the resources or expertise in-house to transition to the new standard,' he says. 'Remit had previously helped implement leading practice processes in our property management department, so they were a natural choice as our partner for this work.'

He adds: 'We had to look at all the procedures we have in terms of the way we operate and bring them up to date to suit the ISO system. It gave us a chance to refresh everything we do, see what we were missing, and make sure we were fully up to date.'

'With Remit's guidance, we had the chance to examine a whole series of processes that are vital for our business. We discovered some significant improvements we could make, particularly related to the way we draw up new processes and the programs we use to pull our Quality Management System together. The project has left our business with more confidence internally and more robust, efficient processes that will enable us to provide a better service for our clients.'

Chantel Barker, Compliance Manager, Montagu Evans

Remit deployed a small team including Partner **Melita Thomas** and Assistant Consultant **Rebecca Ewart**, who specialise in process improvement and compliance.

'**Melita, Rebecca** and the rest of the Remit team worked very closely with us,' says **Roger**. 'They listened, came up with practical suggestions and didn't try to blind us with technical gobbledegook. I liked them, other people in my team liked them and we genuinely got on very well together. I'd certainly recommend them to other property professionals looking for guidance on processes.'

The project gets underway: identifying scope

The project kicked off in September 2017. We started by identifying the scope of Montagu Evans' business that was covered by ISO 9001.

We used our Remit Process Model (RPM) to map out all the processes involved under three headings: administration, technical and quality.

- 'Administration' looks at areas such as the Anti-Money Laundering Act, conflict of interest, communications, GDPR, Bribery Act compliance and data breach management.
- 'Technical' covers valuations, rent reviews and property disposals.
- 'Quality' takes in quality records, processes, audits and reviews.



The next step: harnessing ideas and perfecting processes

Next, Remit facilitated a series of workshops in October and November 2017 to discover how best to improve and standardise these processes. Around 100 people took part from across Montagu Evans' business, including valuation, rating and planning professionals as well as representatives from administrative departments.

'We brought along our standard leading practice processes and worked with Montagu Evans to make sure that they fit with their clients' requirements,' says **Melita Thomas**. 'We considered the potential risk in every process and put measures in place to counteract those risks.'

'It was really productive to bring all the teams together in the workshops. It became clear that people were doing things in different ways across the business, so our discussions enabled us to create ideal process flows that would help everyone to work together in a more integrated, consistent and efficient way.'

Successful conclusion ahead of the deadline

Following the workshops, we documented the 35 processes into a new manual. For each process, we created a full process flow that identified the people responsible for that process and the steps to be taken. The manual also covered the purpose of each process, a description of the process, inputs / forms / templates, outputs / reports, performance indicators and risk mitigation.

Roger Sewell particularly appreciated the way that Remit took the pressure off at a critical time. He comments: 'Remit effectively took the hard work out of the project for us. They went through a really helpful process in the workshops, solved the problems we were facing and then wrote up the procedures in a way that made sense. At the end of the day, it worked and we got the result we wanted. That's fundamental in business.'

There was a hiatus of a few months as Montagu Evans waited for **Chantel Barker**, the new Compliance Manager, to take up her post. Once she was in place, we shifted into a high gear to complete the transition to the new standard in August 2018, ahead of the September deadline. Montagu Evans has now received sign-off from the ISO auditor.

'I am pleased to let you know that we have successfully transitioned to the new standard and that we have had a subsequent surveillance visit with no major issues. Thank you very much for all the help and advice you have provided. You have done a fab job and have successfully helped us to get to a much better position.'

Chantel Barker, Compliance Manager, Montagu Evans

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