

## Remit Case Study: The Portman Estate

**The Portman Estate owns and manages a 110 acre estate of commercial and residential properties in London's West End.**

**Last year, the organisation decided to take a more strategic approach to its IT support services, and asked Remit Consulting to analyse its requirements and help it select a new IT support provider.**

### Prime real estate in London's West End

The Portman Estate is in the heart of London, located between Oxford Street and Edgware Road, and has been owned by the Portman family for nearly 500 years.

The estate currently owns and manages more than 600 commercial and residential properties including the grand Georgian terraces of Bryanston Square and Montagu Square, the area around the Wallace Collection in Manchester Square, Portman Square, Portman Village and Chiltern Street with the Firehouse restaurant.

### A lack of strategic IT advice

A team of around 60 people manages the property assets of the Estate, both directly as landlords and through relationships with long-term lease holders.

Over time, the Portman Estate had adopted a variety of IT systems and support to manage its business systems, which covered elements such as property management, accounting and finance, a help desk, document management and basic IT support.

However, different providers operated these systems, with no single point of contact who co-ordinated, managed and resolved any IT problems that occurred. This resulted in issues between providers, a certain amount of 'buck passing' and, inevitably, delays in getting problems fixed.

An additional drawback was that the providers supported the existing technology, but did not offer strategic, future-focused advice on how the Portman Estate could benefit from new technologies as they emerged.

### Strategic selection vs a pin in the Yellow Pages

The Portman Estate wanted to change to a more efficient, strategic IT support provider, but didn't have an internal IT team available to run the project.

"We didn't have much technical expertise in-house and it was quite difficult to know where to go," says [Mark Southern, Finance Director of the Portman Estate](#). "IT support is a big fragmented market and there are lots of options out there. We received many unsolicited approaches from IT firms but without any recommendation it felt a bit like sticking a pin in the Yellow Pages. We wanted help from someone who was aware of what is available in the market and could guide us from a broader, more strategic perspective."



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"Software choice and reporting tools are a constant bugbear for many businesses," says [Mark Southern, Finance Director of the Portman Estate](#)

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The Portman Estate chose Remit Consulting as its partner for the project, following a recommendation from the Cadogan Estate.

## Reviewing the current state of play

The first stage of the project started with a report in July 2014 that reviewed the Portman Estate's current IT support services, analysed the main issues and summarised the key requirements for IT support.

"Two of our consultants talked to surveyors, administrators and finance people at the Portman Estate," **says Mark Jones, a Partner at Remit**. "Over a few sessions they gathered feedback on the different support services delivered by different providers.

This process enabled Remit to put together a report recommending that the Estate should tender for a Managed Service Provider to look after all the other providers. As a result, the Estate would establish a relationship with one key provider who would be the first point of contact for all IT service issues.

## Finding a new provider

Next, between September and November 2014, Remit helped the Portman Estate to retender its IT support and select a preferred supplier. This process involved:

- Writing a specification of services;
- Issuing a Request for Information (RFI) to a long list of candidate suppliers, and analysing RFI bidders;
- Issuing a Request for Proposal (RFP) to a short list of candidate suppliers, and analysing RFP responses;
- Writing a report on decisions taken and recommended next steps

"There are so many suppliers in the market," **says Mark Jones** of Remit. "We helped speed up that initial stage by using our contacts in the property industry to identify the best contenders."

It was a collaborative process, with Remit supplying its technical expertise and knowledge of the market, while the Portman Estate made sure that the prospective suppliers matched its requirements.

"The Chief Executive of the Portman Estate, Bill Moore, was also very interested in making sure that the culture of the new provider would fit with the Estate's core values," **adds Mark Jones**. "When we were down to the last four potential suppliers, an important factor was their customer service and corporate social responsibility credentials."

The Portman Estate had a number of criteria for the final selection of its new IT support supplier. In addition to technical expertise, the final choice stood out in terms of its cultural fit, customer service, staff quality and understanding of the Portman business.

## Bringing rigour and structure to the process

For the Portman Estate, Remit added value by approaching the tendering process in a very thorough way. "Remit created a rigorous structure and framework so we covered all the information we needed and gave the prospective suppliers a clear list of our specifications," **says Mark Southern**. "We had all the tenders in a similar format and knew it was a level playing field."

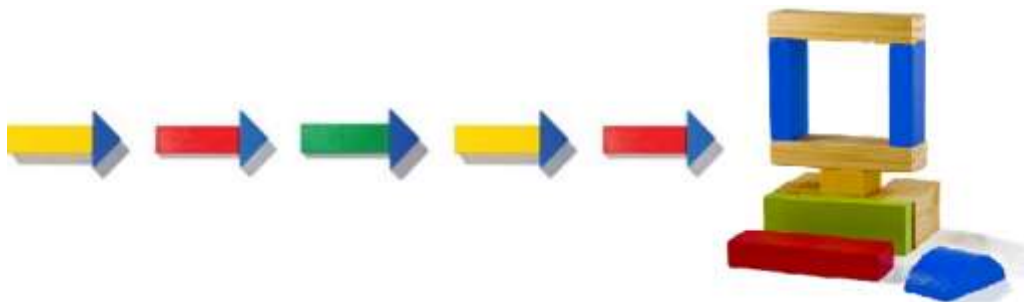
"Left to our own devices, we might have done something less detailed, and there were a few wry smiles from the firms we interviewed, with people saying that Remit were very thorough! But it did mean the tender was pretty comprehensive and we had a clear idea that we'd covered all the important aspects."

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"Remit put forward candidates we wouldn't have known about. In fact, the final candidate wasn't even on our original list" **says Mark Southern**

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By providing expert support and drawing on its knowledge of the market place, Remit ensured that the Portman Estate would select a high-quality provider that represented good value for money.



### The right result

The Portman Estate is confident that it has now found an IT partner that will provide the expert support and strategic advice it requires. "Through this approach, we've had a wider exposure to the market, gone through a structured process and come up with the right solution for an IT partner for the medium and longer term," says Mark Southern.

Remit led the project, but left the decisions to the Portman Estate. "They made helpful challenges, guided us through the process and prompted us without telling us what to do," adds Mark Southern. "They struck the right balance between taking the initiative and leaving us to make the decisions so it was our choice at the end of the day."

"Remit people were very helpful, clear and responsive," he continues. "It was a very constructive relationship. I'd definitely recommend Remit to another company in our situation, if they don't have much technical expertise in-house and need someone familiar with the property market who can act as a guide."

For more information:

#### Remit Consulting

Mark Jones

[mark.jones@remitconsulting.com](mailto:mark.jones@remitconsulting.com)

+44 20 7969 2738