



# Diocese Case Study

**Paul Toseland**  
Diocesan Surveyor

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Changing Lives, Changing Churches for Changing Communities

## The Diocese of Bath and Wells

The Diocese of Bath and Wells comprises a network of individuals, parishes and schools in and around the county of Somerset and South-West England. We have just celebrated 1,100 years in existence and are one of 44 diocese of the Church of England.

We currently manage around 280 houses mainly occupied by members of the Clergy with a proportion let during vacancy. In addition to this we have approximately 3,500 acres of glebe land in 350 holdings throughout the Diocese ranging from South Bristol to South Chard and Exmoor to Frome.

Prior to the implementation of Propman, we were using a basic database to record property details. We chose Propman based on recommendations from other diocese, good presentations of Propman from Grosvenor Systems and a comparison of initial and ongoing costs against potential savings in staff time and numbers. Its simplicity and overall coverage were impressive for our range of work.

One of the key features in Propman we find beneficial is the 'Job' function, which allows us to accurately track the progress of a job as well as easily email orders to contractors, email copies to occupants and create commitments for accounting purposes.

Propman has automated many day to day processes, making it much quicker to send out routine letters to occupants as well as email and mail merge.

The Keynote fields have allowed us to create our own records based on our reporting requirements. A key benefit is the facility to accurately monitor the budget and produce reports.

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[www.grosvenorsystems.com](http://www.grosvenorsystems.com)

T: +44 (0)207 378 8358 F: +44 (0)207 378 8355 E: [sales@grosvenorsystems.com](mailto:sales@grosvenorsystems.com)  
Unit A 7 Leathermarket Street London SE1 3FB



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*“Propman has allowed data to be shared much more easily across the department, particularly with some users logging in remotely from site, being able to update records and order works without coming back into office.”*

The Links function has allowed us to move towards an electronic filing system with key documentation saved on Propman which is easily accessible for all users.

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Each year, Grosvenor Systems hold a Propman Strategy Group meeting. At the last one in London we established some useful diocese contacts for swapping information and ideas. This later resulted in a visit to our site from another diocese to discuss other useful functionalities in Propman which was extremely beneficial for both of us.

The training programme helped us plan the loading of our data onto the database together with exploring how we would develop our processes in conjunction with using Propman effectively.

The training we received was very good and bespoke to our operation. It was particularly helpful to have agreed an implementation plan with targets which helped us input our data and plan our training sessions. We are still learning and developing our use of Propman and the support at the end of the phone is always excellent. The support staff are always patient and they always find solutions to any problems that arise.

The overall experience in using Propman has been very positive.

[www.bathandwells.org.uk](http://www.bathandwells.org.uk)