

**Case study**  
**Direct Line Group**





**Objective:** an intuitive resource management system that does more than book resources. Providing data outputs to help Direct Line Group shape and guide their facilities provision, property, and environmental strategies.



## Background

Direct Line Insurance Group is one of the UK's leading insurance companies and home to well-known brands including Green Flag, Churchill, and NIG. It was formed in 2012 by the divestment of The Royal Bank of Scotland Group's (RBS) insurance division. Steve Thorburn is a Security Assurance Manager for Direct Line Group (DLG) Property. Working within the DLG Property Team, Steve's role is to work with the business to:

- shape the future ways of working
- ensure it supports its employees in delivering to the Group's customers
- maintain the safety and security of the property and its inhabitants.

Across the UK, Direct Line Group have approximately 10,000 employees serving its customers, whether they are in an office environment or in one of the many vehicle accident repair centres.

## The need: a desk booking system fit for purpose.

In 2017, Direct Line Group started to review their options around room booking software. However, due to priorities elsewhere, this was deferred until it was brought back to the forefront as Covid hit in 2020. Given the limitations of their existing system to support Covid restrictions and having now compiled a comprehensive operational requirement document, Direct Line Group went to the market to explore the various resource systems available.

Like many organisations, Direct Line Group was required to implement pandemic measures, such as Track and Trace and social distancing. However, they also wanted their system to have the ability to book desks and collaboration spaces.



Direct Line Group also wanted to capture data so that they could understand how their offices were being used. This data would help shape their property strategy by providing insights into the needs of the building users and how they could support their working practices. In addition, Direct Line Group wanted something:

- intuitive
- flexible
- mobile
- easily available to their team
- easy to use

In tandem with the new resource management system procurement, Direct Line Group were also reviewing their access control system and looking for something more flexible. It needed to integrate with various Business and HR systems. This led to a tendering process for a new access control system.

## The solution: meeting room and desk booking software connected to access control.

As a result of the tendering process, Direct Line Group appointed Matrix Booking alongside a cloud-based access control partner during this process. Steve Thorburn commented: "All providers we spoke to said that we can scan a QR code to check you into a desk, start a meeting, or confirm attendance via an app, and use lights on desks to show that they are in use. We found this to be a behaviourally driven approach, with no consequences for users who do not follow these steps. For example, what if the QR code did not work? What if I don't book in? These approaches were also heavily reliant on employees' behaviours or using their own devices or company devices to 'check in.' This started a discussion about linking our new desk booking system with our access control system by developing an API, and only providing access if you have a resource booked."

This was a new initiative for both organisations. There is currently nothing available on the market that links enterprise access systems to resource booking platforms. Such a move would ensure that only those who have made a booking will be able to gain access to the building. The system will also automatically check employees in, removing the need for a separate check in process whilst also meeting a basic security principle of access based on need. This initiative was brought to life by Matrix who took the lead on developing the API and linking it to the access control system and DLGs core systems. Following successful testing, this integration was released in December 2022.

Steve continued: "We met Matrix Booking at the IWFM Awards in 2019 and invited them to take part in the tendering process alongside six other suppliers. We have now been working with Matrix Booking since September 2021, and I must say that Paul Scott (CTO, Matrix Booking) and the team have been great working with us on the integration and testing, ready for us to



go live with the access control system integration. This integration is unique, and I am not aware of anything on the market that currently has this capability and functionality. We chose Matrix Booking over its competitors for several factors. Whilst the cost was very competitive and demonstrated real value for money, the teams at Matrix Booking also made us feel secure in the knowledge that they will give us focus and excellent customer service. Their commitment to system development has been outstanding.”



## Outcome: real-time occupancy data to understand patterns and ways of working.

As a result of this integration, Direct Line Group anticipates being able to better support their employees within the workspaces by using the Matrix Booking data to understand what and how resources are being used as well as the general pattern of activity within the portfolio of offices. Over time, Direct Line Group will use and report on the data to show how many bookings are being made and how many of these bookings are being fulfilled.

User experience is very important to Direct Line Group. Steve explained: “My advice to anyone looking to undertake a similar project is to be clear on your operational requirements, but do not let them become a restriction. You may have a view on how you want to achieve something, but there may be a better way, and let the experts in the field lead these discussions. Start by creating user stories for each user type and map their needs to ensure the product meets both your departments’ and the building users’ needs. Understanding the subtle differences in web and app functionality is also key, ensuring that the system is readily available to all.”

“The Matrix Booking Technical team have been excellent. I am excited to see the new developments that Matrix Bookings have in their roadmap and looking forward to how these developments will further enhance the way that we work at Direct Line Group.”

Steve Thorburn  
Security Assurance Manager, Direct Line Insurance Group

