*Proptimo, powered by CPL Software

Case study

A growing portfolio, a smarter solution

Since launching in 2013, Taylor & Martin has grown into a leading property factoring company in Scotland, managing 15,000 properties across 500 sites. Their team of 30 operates across Glasgow, Edinburgh, Dundee, Fife, and the North of Scotland.

At the helm is Michael Martin, Director and Co-Founder, who, alongside Marc Taylor, built the company on a commitment to high-quality property management and hands-on client support. Michael works closely with property developers, guiding both new and existing clients through the complexities of property factoring.

Michael Martin
Director & Co-Founder

From the beginning, Proptimo has played a key role in their operations. But as the business expanded, Taylor & Martin realised they had only scratched the surface of what the platform could do.

The challenge

Scaling a service-first approach

"From the start, we knew we needed software that could meet the needs of a niche market. Proptimo was the natural fit, and it's only improved over time."

Taylor & Martin set out to offer a more hands-on, personalised service, ensuring that each property manager looks after fewer properties, allowing them to build stronger client relationships and provide a higher standard of care.

However, as the business grew, they quickly realised that an increase in client volume created issues for scaling this service-first approach. Inefficiencies in certain internal processes became more apparent, and manual, time-consuming tasks such as invoice approvals, financial tracking, and compliance checks were limiting the team's ability to focus on meaningful client interactions.

While Proptimo had always been part of their operations, they were primarily using it for client records and invoicing, with much of their daily work happening off-platform. This meant they weren't fully benefiting from the efficiency and automation that the system could offer.

The solution

Unlocking their full potential

"At first, we thought of Proptimo as just a client database and invoicing tool. Over time, we realised how much it could streamline our processes, improve accuracy, and save us hours every week."

Recognising the need for greater operational efficiency, Taylor & Martin made a strategic shift to fully integrate Proptimo into their workflows.

Automating processes: Features such as diarised charges and the insurance function eliminated hours of admin work across the team.

Streamlining contractor invoices with AI: As a core part of the Proptimo platform, Contractor Portal replaced Taylor & Martin's manual invoice process with AI automation, making approvals faster and more accurate.

Improving data management: Switching to system integrations replaced repetitive, click-heavy tasks and improved accuracy.

The impact of these changes became even clearer in July 2023, when Taylor & Martin acquired another factoring business. With both companies already using Proptimo, the seamless transition reinforced its role as a core platform for business growth.

The results

Less admin, more client focus

"Every efficiency we gain means more time spent delivering the best service to our clients. Proptimo doesn't just help us manage properties — it enables our growth."

By making full use of Proptimo, Taylor & Martin has seen significant improvements across the business:

Days saved per week: Removing manual processes has allowed the team to work more efficiently.

More time for clients: Property managers can now focus on building relationships, attending site visits, and scrutinising contractor work.

Improved financial operations: Automated invoice processing and reporting has reduced errors and enhanced cash flow oversight.

Sustainable growth: Proptimo's efficiency gains have enabled Taylor & Martin to scale without significantly increasing headcount.

Looking ahead

An ongoing collaboration

Taylor & Martin is now conducting a one-off full system audit with the Proptimo team to explore even more ways to optimise their workflows. Their goal is to further improve efficiency, enhance their service quality, and continue growing, all without the addition of unnecessary operational costs.

Through monthly review calls, ongoing training, and direct feedback, Proptimo continues to listen to their feedback and evolve with their business.

"It's a no-brainer. Proptimo has been integral to our growth and will remain so. It's built for the industry, adapts with its users, and eliminates the need for multiple systems. Everything we need is in one place."

proptimo | Taylor & Martin — Bespoke Property Management

Smarter block management starts here

Taylor & Martin's success shows how the right technology can streamline operations, improve efficiency, and support sustainable growth. With Proptimo, you get a smarter, scalable solution designed to evolve with your business.

Ready to see how Proptimo can transform your block management?

Get in touch today

Book a demo

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