Reducing risk and gaining competitive advantage

ICT transformation to prepare for growth through acquisition

acora
The Choice of Leaders

Customer challenge

- Improve infrastructure availability & performance
- Reduce risk & unnecessary cost
- Improve system documentation
- Improve service to end users

Plan-Net solution

- Infrastructure audit report
- Design & implementation of infrastructure upgrade
- Project design & configuration documentation

Benefits

- Streamlined infrastructure management
- Increased end user productivity
- Improved end user perception
- An acquisition ready platform

ASHCOURT ROWAN

Ashcourt Rowan PLC is a premier provider of integrated financial planning and investment services in the UK, delivering holistic financial advice and investment solutions to meet the wealth management and pension needs of private clients, charities and corporates.

Supporting ambitious growth plans

Following his appointment as Group Chief Executive, Jonathan Polin announced ambitious growth plans for the financial services firm, confirming the acquisition of suitable small to medium sized advisory firms as key to this.

Subsequently, Polin made a number of strategic hires including Mike Garlick as Group Head of ICT. Mike's remit was clear; ensure Ashcourt Rowan had an 'acquisition ready' ICT platform.

On joining, Mike could immediately see that this would be no small task. The infrastructure wasn't stable, there were fragmented environments and integration issues and there was no standard operating environment in place. What was even more alarming was the feedback from the business. The message

was clear, IT was prohibiting business and growth at Ashcourt Rowan.

At this stage, he felt it essential to thoroughly understand the platform and quickly document the issues and risks. To achieve the timescales, he decided to engage a third party.

The discovery phase

Having come across Plan-Net at his previous organisation, he engaged with the IT services provider to assist in this 'discovery' stage.

Plan-Net conducted a full infrastructure audit, lasting 4 weeks, across the firm's Microsoft, VMware, Citrix and storage stacks and presented this back in a detailed report.

The report detailed the status of over 80 measures in a traffic light system format and summarised key areas of concern across design, documentation, disaster recovery, network, Active Directory and user support.

What was really useful to Mike was an independent review that could inform the feedback he had received and validate his own thoughts on the current state of the infrastructure.

"The quality and depth of the report by Plan-Net was simply superb. Besides the level of granularity from a technical perspective, what it also did was allow a non-IT literate individual to understand the key concerns" explains Mike.

Armed with this report, Mike was able to present and gain approval from the board for his three stage plan of stabilisation, enablement and growth.

The stabilisation phase

The purpose of the stabilisation phase was to significantly reduce risk, improve availability across all applications and systems, improve service to end users and reduce unnecessary cost. It involved addressing the 'red' and 'amber' issues of the audit, and because of the substantial amount of work this would involve, Ashcourt Rowan contracted Plan-Net to work alongside Mike's team and lead the upgrade of its Microsoft, Citrix, VMWare and storage environments.

Mike explains: "The stabilisation period was incredibly challenging for all of us. Firstly due to business deadlines, we had to squeeze what would normally be an 18-month project into 6 months. There was the added pressure of ensuring business continued as normal. The last thing you want as an investment manager is to come in on Monday and find your trading systems aren't working. It's the lifeblood of the company.

In addition, it was also inevitable that on our journey of fixing known issues, we would unearth more problems. Things really had to get worse before they got better and it required a lot of flexible working on evenings and weekends, patience and clear and constant communications back to the business about why this work was necessary before finally arriving at a stable platform that was fit for purpose." Mike continues.

"I can't stress enough that we couldn't have achieved it without the help, knowledge, expertise and importantly work ethic of the team at Plan-Net. Everything from the initial scoping and audit, to the implementation and after care has been absolutely fantastic and put us in a good position as a firm."

Achievements

The project was completed on time and Ashcourt Rowan is already feeling the benefit as a business.

Mike reports: "We've now addressed 97% of the issues raised in Plan-Net's audit and it has meant we're experiencing record uptime on all our key systems and have a 55% reduction in call volumes over the last six months. We've also been able to significantly reduce our risk with the exceptional documentation by Plan-Net. If none of my team were here today, someone could still pick up the documents and know exactly how our ICT was organised."

The biggest impact has been on the users, as Mike explains. "The project has been transformational. Users who were here before are finding the ICT improvements have directly impacted on their productivity, and those joining us now have nothing to complain about! It's a good news story for us, the business and Plan-Net, as we've been able to totally change the perception of IT."

The IT team at Ashcourt Rowan are now able to focus on enablement projects and the improved morale is noticeable. "We're a different kind of busy now, which is refreshing. Users can talk to us about their requirements and we have the time to listen and start working with them. We can now focus on positive plans and innovation to help the business. We're in the middle of a number of enabling initiatives around enterprise mobility and collaboration and we're also working much more productively with our compliance team."

Mike concludes "Most importantly, we have a first-class ICT platform so we are in the perfect position to support Ashcourt Rowan's acquisition strategy and we couldn't have achieved this without Plan-Net."

Acora and Plan-Net join forces

In 2019 Acora announced the completion of our merger with Plan-Net. This created a group with over 300 employees, 4 offices and 300 customers, focused on delivering outstanding customer experience to businesses across the UK. The group is underpinned by great people, strong technical innovation and a combined desire to grow.

This Plan-Net case study is an example of the great work the team have delivered and the combined capabilities of the new group.

If you would like to talk to us about any of our services, you can contact us via phone, email or through our website. Our team will be happy to help.

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