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*Business Before Technology™ - We Get IT!*

## Case Study

## Investment Advisor Finds Competitive Advantage by Outsourcing Computer Management

### Background

T.J. Jones says that his firm, Gamble Jones Investment Counsel of Pasadena, California has one competitive differentiator: their people. As one of the premier RIA's in the Southern California area, the company's success is built on excellent client service and depth of knowledge. "A client can call us day or night and know that they'll get what they're looking for - and fast" says Jones, the Operations Manager as well as a Principal in the firm. Delivering that kind of service requires long-term employees with deep expertise and a collaborative environment. It also requires a robust network of computers that enable these experts. "In the early 90's, we introduced PC's into our business, and it's grown steadily to the point where we are completely dependent on our network," explains Jones. "All of our portfolio information is online, our pricing systems, our trading systems, our account management, everything. We simply could not deliver our level of service without reliable technology."

### The Situation

With two locations, various field people, Portfolio Managers, and an internal support staff, GJIC's network spans a wide geographic area and all of the company's corporate functions. In addition to the network services, the underlying application functionality and integration requires a level of expertise simply not found in most network support organizations.

"If our computers go down, it slows down our level of service," says Jones. "Our people expect their tools to be available every morning when they come in. That's why we rely on FPA Technology Services, Inc. to manage our IT."

### The Challenge

In late 2008, the recession hit hard and no industry felt it more than Investment Advisors. It was in this environment that GJIC was looking to streamline their business processes and manage their expenses tightly. With the level of investment in their IT infrastructure that they have, it was hard not to look at ways to reign in the spending related to its ongoing support. The difficulty laid in how to reduce this spending without reducing the level of service nor impacting the uptime GJIC came to expect.

### The Solution

As Gamble Jones' trusted technology advisor for years, FPA presented the option of moving GJIC to one of their fixed fee *We Get IT! Managed Service* offerings. Moving to this approach, based on a remote monitoring and alerting system, allowed FPA to move Gamble Jones from a reactive "break / fix" approach to a proactive "managed" approach. This gave Gamble Jones the ability to budget for their ongoing support costs, move the risk associated with support to FPA's shoulders, and improve the uptime of their systems - all while reducing their ongoing support costs. "Our mission is to deliver enterprise level support and management to smaller businesses all while removing the worry around their IT," says Craig Pollack, Founder & CEO of FPA Technology Services, Inc.

GJIC relies on FPA's *We Get IT! Managed Services* in which FPA takes complete responsibility for GJIC's computer infrastructure - all at a fixed fee. This includes remote monitoring, patching, and maintenance of their servers and PC's, unlimited help-desk support, and reduced on-site hourly service rates. In addition, their plan also includes quarterly IT Status Meetings providing for a forum to plan and manage their technology in a proactive fashion. Again, allowing for increased ROI over the break/fix approach of the past.

### Fast Facts

#### Gamble Jones Investment Counsel

Pasadena, California

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

#### Makeup:

- 3 Locations
- 7 Servers (Including MS-Exchange, Citrix/Terminal, MS-SQL)
- 25+ Workstations

#### Applications:

Advent Axys, Baseline, Bloomberg, Intuit Quickbooks, MS-Office

#### Challenge:

- reduce ongoing IT support costs
- budget for consistent IT support costs
- increase network uptime
- reduce day-to-day involvement of onsite staff in IT

#### Solution:

FPA's *We Get IT! Managed Services* (Support/IT Service Level)

### Benefits

The benefits of FPA's *We Get IT! Managed Services* are significant and extend across every area of Gamble Jones' business, improving workflows and maximizing their ability to serve their clients.

#### **Lower Total Cost and Better IT Support**

FPA brings Gamble Jones a much broader set of skills and resources than they could accomplish with a single IT person on their own staff, resulting in better outcomes and lower overall costs. GJIC now has access to an expert staff of helpdesk engineers. By remotely controlling clients' PC's, FPA can fix problems remotely up to 95% of the time saving both time and cost. "Our clients are finding that the combination of lower total IT cost and greatly improved IT functions is very compelling," notes Pollack.

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**T.J. Jones**  
Operations Manager & Principal  
Gamble Jones Investment Counsel

#### **Greater Reliability and Uptime That Minimizes Business Interruptions**

"For our business, preventing downtime is everything," says Jones. "I love the fact that with their monitoring capabilities, FPA knows what's going on with our network and I no longer have to worry about it. They tell me when something's wrong rather than the other way around. And – most of the time they fix things BEFORE we even know about them!"

#### **Proactive Security that Protects the Business**

In an environment where threats from viruses and malicious software are ever-increasing, FPA's proactive monitoring and management enables Gamble Jones to be **proactively** protected. FPA constantly monitors the PC's to ensure that critical security software is in place and up-to-date, without bothering the end user. "If a company has a single or a part-time IT person, it often means that mundane but critical activities, such as software patches and security updates, just don't get done," explains Pollack. "We prevent that kind of exposure."

#### **Strategic Expertise and Optimized Growth of the IT Infrastructure**

When FPA takes on a new client, the first step is a complete audit of their IT infrastructure and analysis of their business needs. "Our goal is to gradually and carefully move the client's infrastructure to a point where their business applications and underlying hardware can support their business objectives," says Pollack. Then as they manage the client's network, FPA carefully monitors performance and usage, identifying potential bottlenecks and mapping out intelligent growth. FPA's detailed reporting on a client's IT usage and trends helps the client to intelligently plan for future growth and effectively budget their IT spending.

#### **Gaining an Entire IT Department While Lowering Overall Cost**

Gamble Jones relies on FPA to take complete responsibility for their computer infrastructure. And with FPA's "business first" approach and wide ranging skill set they are unrivaled in the industry. "With our move to FPA's *We Get IT! Managed Services*, FPA has really helped our firm position itself in a way that helps us grow while keeping our IT costs down," says Jones. "They have been nothing short of superb."

### For More Information

For more information about FPA, visit [www.fpainc.com](http://www.fpainc.com) or [www.fpamanagedservices.com](http://www.fpamanagedservices.com) or call 818-501-3390.

### About FPA

FPA Technology Services, Inc. has provided outsourced IT services to growing businesses since 1991. With FPA's "business first" approach, FPA prides itself on being a trusted technology advisor helping clients leverage technology to achieve their business objectives.

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