



Working together to support the growth of professional companies





As a firm of independent financial advisers, Almary Green are able to recommend and give counsel on a range of products across the whole of the financial market.

Their team of fully qualified advisers work with clients to build a plan based on their needs, identifying the most appropriate package of investments, protection and pensions. Each of the advisers at Almary Green has their own area of expertise, covering both the personal and corporate sectors.

In addition to being green by name, it is also their intention to be green by nature; using technology to run a paperless office and enabling their advisers to work remotely. Advisers, supported by a strong back-office team of para-planners and administrators, cover the Norwich, North Norfolk, Ipswich and Cambridge regions, and are happy to travel further afield to assist their clients.

The Challenge:

As a company, Almary Green have undergone significant growth, from a smaller organisation we started with just 2 employees in 2001, to the expanding firm they currently embody, following some key mergers with other IFA firms (Independent Financial Advisers). As a result of the mergers, Almary Green have seen an increase in personnel, a positive and necessary requirement when the company's ethos is to provide an excellent level of customer care and availability to their growing client portfolio. With a continually expanding employee base, a move from compact offices located by their namesake, Almary Green, in Norwich to a new, open plan building on the Meridian Business Park in 2005 was both a timely and natural progression.

'Our continued success depends on having reliable technology that grows with us. Breakwater have consistently supported our systems, giving us help and advice whenever change is needed and ensuring that we enjoy uninterrupted access to the tools and data that are critical to the delivery of our advice service. They are truly our partners in growing Almary Green and we count their people as our friends – from Chairman Peter Davies down to the guys on the Helpdesk.'

Carl Lamb, Managing Director

The development of the firm and resultant increased demands on its IT infrastructure further highlighted the requirement for an experienced and dependable IT services provider. Breakwater have been the providers of this IT support since 2006, overseeing the necessary changes and new software required for such a progressive company.

Almary Green were Breakwater IT's first Managed Support client, an accolade that requires a consistently high level of ongoing service to develop into a successful and enduring partnership. It was essential that Almary Green were receiving excellent levels of support and advice from Breakwater's engineers and account managers to ensure the service progressed in line with their future objectives.

The Solution:

Breakwater IT worked closely with Almary Green to provide managed support for their day to day IT requirements. This support had to replicate that of an internal IT team, meaning Breakwater's technicians were on hand to resolve and intercept any problems before they impacted on operations. In addition to this immediate support, Breakwater needed to ensure Almary Green's IT systems were equipped with the technology to innovate, in accordance with the longer term ambitions of the firm. Breakwater's account managers worked with Almary Green to ascertain their company objectives and to detail how their IT infrastructure could help to achieve these.

Breakwater designed clear development plans to ensure the most appropriate software and systems would be in place for the growing number of employees. Costs and timescales were plainly communicated so Almary Green knew what to expect and when. Breakwater also employed a flexible support agreement to ensure all aspects of service were catered for and could be tailored to Almary Green's needs. Throughout its eight years as IT provider to Almary Green, Breakwater has developed and maintained strong relationships with key stakeholders throughout the company to make sure services and products are aligned with business goals.

Implementing and supporting new software has been key in ensuring Almary Green can grow at the speed and to the extent it aspires to. Breakwater initially installed Windows™ SBS (Small Business Server) 2003, followed by Windows SBS 2008 and finally the server they are currently running, Windows SBS 2011.

Almary Green

> Independent Financial Advisers

Breakwater are now looking at a plan to migrate from Windows SBS 2011 to Windows Server 2012 R2, this server will be ideally suited to a business of Almary Green's current size, providing them with a responsive, secure solution that ensures they have the optimum software for communication. Through constant monitoring of Almary Green's infrastructure and regular client meetings, Breakwater identified when it was necessary to upgrade servers; talking through the reasons and benefits of each upgrade. As part of the Managed Support relationship it was essential that Breakwater ensured Almary Green were able to take advantage of the latest advancements in security and technology.

The introduction of Office 365 in a Hybrid environment further promoted Almary Green's ability to efficiently communicate with stakeholders, both within the company and externally. The Hybrid function provided the flexibility to migrate specific users and information to Office 365, whilst keeping other personnel on on-premise devices.

The significance of the Hybrid deployment is that Almary Green can maintain the administrative control they have with their existing on-premises Exchange and harness all the benefits associated with moving to the cloud.

Conclusion:

Breakwater's support services have assisted Almary Green's rapid expansion as a company, enabling additional personnel to be seamlessly added to their systems. It is both a successful and longstanding relationship that Breakwater will continue to develop, working in partnership to introduce the latest technology and software to help introduce efficiencies to the business.

The introduction of Office 365 in Hybrid has improved communication across the company, affording an insight into the advantages of moving to the cloud.

Company Profile

Client: Almary Green

Website: www.almarygreen.com

Client size: 50 staff (approx)

Vertical industry: Financial advisers

Location: East Anglia

Contact us today
on 01603 709300
or visit breakwaterit.co.uk

