



Financial Advisor HFM Columbus: Infrastructure Support Services

When infrastructure support issues and unplanned downtime started to affect business productivity, leading Independent Financial Advisors HFM Columbus turned to Krome Technologies to provide them with comprehensive technical support services, and an extensive upgrade of their IT infrastructure.

HFM Columbus.

HFM Columbus provide independent financial advice to clients based internationally and in the UK. Their portfolio includes private wealth management, pensions, mortgages and insurances, as well as a range of investment services for both private and corporate clients.

With 70 employees based across three UK sites, HFM Columbus operates from headquarters based in Weybridge Surrey, with their private wealth management division currently located in Tunbridge Wells. HFM provide specialist services to suit the specific needs of their clients, providing bespoke financial solutions both in the UK and abroad.

Support challenges.

From first level support through to infrastructure maintenance and management, predicting the day-to-day demands on internal support staff can be difficult for any organisation. Ensuring business critical systems are fully operational while providing fast, efficient response times to daily support queries can be a challenge.

As HFM Columbus discovered when their own IT support infrastructure failed, they needed a dedicated support partner to provide a tailored solution, and services that would meet the specific needs of their business; offering comprehensive expertise as and when they needed it most.

As a trusted authority when it comes to independent financial advice, HFM Columbus' clients rely on them to provide a high standard of personal service that meets their individual needs; but when it came to their IT support infrastructure; staff were faced with a support network that fell short of their own high standards.

HFMC's Director Jackie Hoyland came to Krome Technologies looking for assistance with the support of their existing infrastructure, and recalls the difficulties faced by the business at that time; staff members were perpetually struggling with temperamental systems, there was a lack of immediate support; the strain on time and internal resources was affecting the business on an almost daily basis: "Previously we experienced a lot of technical issues and limitations; there was no real managed infrastructure in place, we had no back up or archiving facility, our systems were continually falling over and there were no early warning signals. It was a constant struggle of crisis management".

Failing infrastructure, rising support incidents.

Previously, HFM Columbus had relied on one point of contact to help them with their support issues, but as the number of incidents escalated, it became apparent that it was not only their existing support resource that was failing; so too were other aspects of their IT framework, as Jackie Hoyland explains: "we were operating with a single support contact, and despite them putting in over 120 hours per month, still nothing was working".

For an organisation that understands the importance of efficiency and exceptional levels of service, to be faced with their own internal IT issues was a major cause for concern: "I was under immense pressure, we were without the simplest of technical infrastructures, we had no patterning for even the most basic systematic requirement, and we were reinventing the wheel each time; I was constantly receiving phone calls from people screaming at me that something wasn't working."

"I was looking for a company to set up our IT systems and run them for us, that is when I spoke to Krome. They were professional, reassuring, and they understood exactly what problems we were facing technically. They provided us with a comprehensive and positive plan of action".

Positive change.

Following an increase in the number of IT incidents reported, and the continued rise in unresolved technical issues, the impact was felt across the company; affecting staff productivity and the general perception of the support services provided.

HFM Columbus realised that they needed to make some positive infrastructure changes; focusing initially on finding an organisation that they could rely on to resolve their existing IT issues, and provide a complete review of their existing infrastructure, with a plan for the future. It was then that HFMC called on the services of Krome Technologies:

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Infrastructure Evolution.

Krome provided HFMC with a fresh new direction for their IT support infrastructure, with an immediate short-term strategy that involved upgrading and rebuilding their existing servers and client devices, so that they could be proactively and efficiently maintained, as quickly as possible.

The plan was to immediately eliminate the recurring support issues and hardware or system failures that were proving increasingly disruptive. The initial phase was implemented successfully, dramatically reducing the level of reactive support required in the first instance.

As Hoyland reflects: "our infrastructure evolved very quickly with Krome at the helm". By degrees, Krome gradually implemented a number of processes, and through the provision of regular maintenance, service support, and with the continuous improvements made to HFMC's IT environment, Krome successfully and significantly reduced the hours of unplanned downtime that had previously been experienced on a regular basis.

Knowledge and Expertise.

With the collaboration of HFMC, and Krome's commitment to meeting their requirements as a business, the support provided by Krome has continued to adapt in response to HFMC's immediate and long-term objectives. As Hoyland goes on to explain, the knowledge and expertise of the technical staff at Krome proved invaluable in helping HFMC to plan a long-term IT strategy that would work for them going forwards:

"Information on latest technology developments is absolutely essential for us, we are not IT experts, and before Krome it was my responsibility to try and figure out what was going on in terms of new technologies; now I leave it all to Krome, they advise me on what's new and suitable for our environment."

Once Krome had assumed control of HFMC's support and maintenance contract, the decision was made to implement a system upgrade that would provide HFMC with the infrastructure they needed to meet their existing and future requirements: "we could see that virtualisation was the way to go, although it was going to require financial investment" says Hoyland.

Systems and support upgrade.

Krome designed a solution that would meet the immediate and long-term objectives of the client. As a business, HFMC had already made the strategic decision to adopt Citrix; but as the existing Citrix Presentation Server system could not support the functionality that they required going forwards, Krome recommended a move to Xen Desktop. Once an upgrade plan was agreed upon, Krome took the necessary steps to efficiently complete the migration from Presentation Server (now XenApp) to Xen Desktop.

Once the new Citrix environment had been successfully implemented, Krome turned their attentions to the provision of a technical support and maintenance contract that would meet HFMC's specific needs. One of the major issues previously experienced were slow response times when users reported a technical problem. Once Krome assumed control of HFMC's support infrastructure, users were able to either log support incidents online or call Krome's dedicated helpdesk directly, allowing them access to a technical member of staff to effectively resolve reported problems as expediently as possible.

Having provided access to a centralised helpdesk, Krome then addressed the second issue which had previously caused HFMC such significant disruption; systems going down unexpectedly and for long periods of time. Krome adopted a preventative approach to the problem, basing a dedicated technical resource at HFMC's head office, to provide proactive maintenance on a weekly basis. By identifying and eliminating any potential problems before they occurred, HFMC's support infrastructure could be managed far more efficiently; ensuring systems remained operational, giving staff the opportunity to prepare for scheduled upgrades and updates, preventing unplanned downtime and avoiding potential system failures from detrimentally impacting HFMC's day-to-day operations.

With an onsite contact implementing proactive support and maintenance, and all IT related support calls routed through Krome's central team, HFMC's support infrastructure was soon stabilised and efficiently managed, with the number of technical incidents kept to a minimum.

A new stable and fully supported infrastructure.

Following the successful migration to Citrix Xen desktop, and the positive changes made to HFMC's support contract, the overall perception of their systems is now a positive one, throughout the business: "our whole infrastructure is now stable" says Hoyland, "I never get phone calls from people complaining about our systems".

The upgrade of HFMC's internal systems, and the move to Citrix Xen Desktop has provided HFMC with an IT infrastructure that will support the needs of the business now, and in the future. With the proactive provision of support and maintenance, Krome continues to deliver HFMC with the high levels of service that they have come to expect from their IT support partner, as Hoyland explains:

"We feel that Krome are on our side; they actually feel like partners rather than people we employ; we trust Krome completely. Their positivity, helpfulness, technical expertise, and ultra personal customer service are key for us, Krome genuinely care about our business".

If you would like to speak to one of the team about this case study, or require further information please contact us.