

Reimagining IT to Meet the Needs of a Changing Business

Part one of Mattioli Woods' Technology Transformation

Summary:

Client: Mattioli Woods plc

Sector: Wealth Management and Employee Benefits

Company Size: Revenues of £50.5 million, 650 staff, nine locations

IT Department: 12

Key Technologies: Microsoft Azure, Office 365, Specialist SaaS Business Systems

IT Lab Services Provided: Strategic Consulting

Project goal:

Create an IT strategy which supports growth, reflects user needs, and fosters cultural change.

“Working with IT Lab enabled us to re-evaluate what we do and why we do it. The perspective of their strategy team helped us to see things differently, and their expertise in Microsoft Azure gave us the confidence to embrace cloud computing.

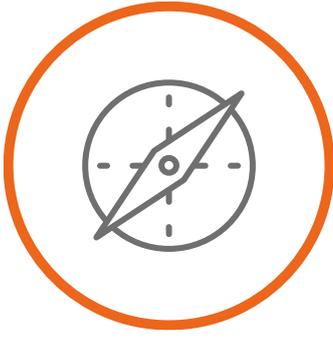
They also encouraged us to redefine our relationship with our users. As our technology changes and evolves, their support is vital. By forging stronger links and fostering open dialogue, our users are onside, and we're driving the business forward together.

- Asif Naidu, Technology and Integration Director, Mattioli Woods



The Client:

Mattioli Woods plc is one of the UK's leading providers of personal wealth management services and employee benefits schemes. It has offices at nine locations across the UK, the largest being in Leicester where the company was founded 26 years ago. It will move into a new £15 million building in the heart of the city centre later in 2018.



Navigate:

Defining Challenges and Opportunities

The key challenges facing Mattioli Woods were:

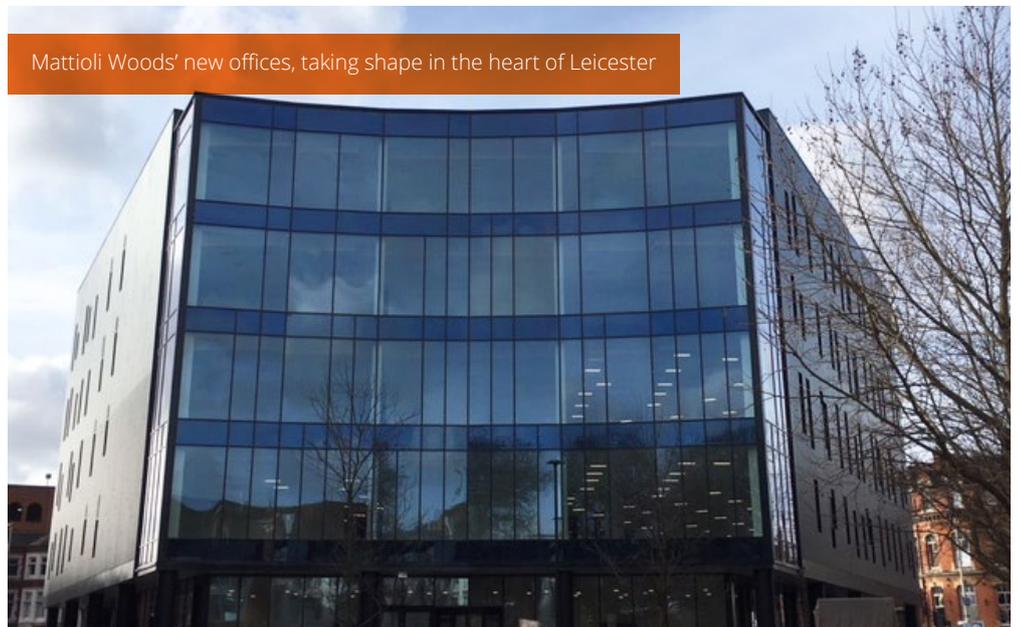
- An ageing technology infrastructure, coupled with a major office move, demanded a speedy re-evaluation of its core technology strategy.
- Rapid expansion through acquisition required a fast and efficient way to integrate new companies within its infrastructure and applications.
- Communications between the IT department and the rest of the business were suboptimal. Consequently, there were process inefficiencies and challenges with technology changes.

“Our primary goal was two-fold: understand what Mattioli Woods’ users needed to be more effective in their roles, and what the business needed to support its ambitious growth plans. We listened to various user groups and gained insights around their processes, data requirements, working habits and overarching needs.

“In collaboration with Mattioli Woods’ IT team, we reimagined their IT strategy to transform the company’s technology landscape. The cloud is now the default place for the smooth and secure delivery of services. The IT team also underwent a transformation. A sympathetic re-structure and new roles supports the department’s growth and personal development. The team is now strongly positioned to deliver greater value to the business.”

- Dan Coleby, Business Performance Director, IT Lab

Mattioli Woods’ new offices, taking shape in the heart of Leicester



To enable Mattioli Woods to optimise its IT strategy, IT Lab:

- Helped the IT team evaluate their onsite infrastructure and convinced them of the benefits of moving to cloud-based services.
- Clarified and delivered effective application cloud migration plans.
- Re-set the IT department's relationship with the business and helped develop and leverage the talent in the team.

Coleby continued: "As a Microsoft Cloud Service Partner with Tier 1 status, we could clearly articulate the benefits of moving to a cloud-based environment. With our guidance, Mattioli Woods specified the best embodiment of that technology to drive the business forward.

"A cloud-only solution with no on-premise hardware will make it faster, simpler and less expensive to bring new companies on board, and the office move will be considerably more straightforward."

The value to Mattioli Woods is immense:

- The way the business budgets for IT has been completely overhauled, and capital expenditure greatly reduced.
- IT staff now have a dual technology and business partner function, ensuring that the technology strategy is optimally aligned with the business.
- Mattioli Woods is now set for its next key milestone: the adoption of IT Lab's Adaptive Technology Model. This will deliver further operational and productivity efficiencies.

Coleby concluded: "Our goal at IT Lab is to work in partnership with on-site IT teams to deliver successful technology outcomes. The attitude and commitment of Mattioli Woods' team was outstanding. We had their trust and confidence and they did not perceive the project as a threat. They embraced it as a learning experience and have grown their capabilities and skill sets. The department has effected remarkable change and demonstrated significant business benefits."

"IT Lab really took the time to understand our needs and our industry. The experience, insight and advice we received reinvigorated our IT function and nurtured and developed our skills as a team. User engagement is key, and now that we have built the story for the business, we are reaping the benefits throughout our organisation."

- Asif Naidu, Technology and Integration Director, Mattioli Woods