



plan.net
Business Advantage IT

Case Study

ASHCOURT ROWAN



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ROWAN

Reducing Risk and Gaining Competitive Advantage.

ICT Transformation At Ashcourt Rowan Prepares The Wealth Management Firm For Growth Through Acquisition.

Customer Challenge

- ▶ Improve availability & performance of infrastructure.
- ▶ Reduce risk & unnecessary cost.
- ▶ Improve documentation of systems.
- ▶ Improve service to end users.

Plan-Net Solutions & Services

- ▶ Infrastructure audit report.
- ▶ Design & implementation of infrastructure upgrade, including Microsoft, VMware & NetApp technologies.
- ▶ Project design & configuration documentation.

Benefits

- ▶ Consolidation of fragmented infrastructure for better manageability.
- ▶ Better visibility of core infrastructure with comprehensive documentation.
- ▶ Stronger disaster recover position & improved compliance.
- ▶ Increased end user productivity with stable infrastructure.
- ▶ Overall perception of IT with end users significantly improved.
- ▶ An acquisition-ready platform.

ASHCOURT ROWAN PLC IS A PREMIER PROVIDER OF INTEGRATED FINANCIAL PLANNING AND INVESTMENT MANAGEMENT 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 of Ashcourt Rowan in September 2011, Jonathan Polin announced ambitious growth plans for the financial service firm, confirming acquisition of suitable small to medium-sized advisory firms as a key to this.

Subsequently, Polin made a number of strategic hires including Mike Garlick as Group Head of ICT in May 2012. Mike's remit was clear; ensure Ashcourt Rowan had an 'acquisition-ready' ICT platform.

On joining, Mike could immediately see that this would not be a 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. Canvassing opinion across the heads of departments, the message back was clear. IT was prohibiting business and growth at Ashcourt Rowan.

At this stage, he felt it essential to thoroughly understand the platform he had inherited, and document the issues and risks surrounding it – and quickly. To achieve the demanding timescales, he decided to engage a third party for assistance.



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Mike Garlick, Group Head of ICT, Ashcourt Rowan plc



The Discovery Phase

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

Plan-Net conducted a full infrastructure audit, lasting 4 weeks in September 2012 across the firm's Microsoft, VMware, Citrix & storage stacks and presented this back in the form of a 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, the 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 of his three stage plan of stabilisation, enablement and growth.





The Stabilisation Phase

The purpose of the stabilisation phase for Ashcourt Rowan was to significantly reduce risk, improve availability across all applications and systems, improve service to end users and reduce unnecessary cost. It involved addressing all of 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 a third of the time. There was the added pressure of ensuring business continued as normal whilst this was all going on. 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 this 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, a huge amount of 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 the after care has been absolutely fantastic and put us in good position as a firm."



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Achievements

The project was completed earlier this year 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 breaking uptime on all our key systems and have seen 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 seen has been on the users as Mike explains.

"The project has truly 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."

About Plan-Net

Founded in 1990, Plan-Net was built on the foundation of IT Services supply to the Financial and Legal industries. Initially supplying project teams to the likes of Midland Bank (now HSBC), the company quickly expanded into the Infrastructure Consulting arena and then Service Management. As a natural progression the company then progressed into the fully Managed Service market and quickly became well known in the Legal and Finance industries as a service provider willing and able to build cost effective and bespoke models for managed component elements of IT.

We work with knowledge-based businesses where IT is key. To compete in their fields, legal, financial, publishing and professional services organisations need optimal uptime, productivity and a smooth experience.

Our services range from specialist IT Consulting engagements through to fully managed SLA-driven End-user and Infrastructure support, available 24/7. Every solution is tailored to the specific requirements of each of our clients, but what's common to all is high levels of response, resolution, security and customer service.



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Mike Garlick, Group Head of ICT, Ashcourt Rowan plc

Plan-Net

Hamilton House
1 Temple Avenue
London EC4Y 0HA

T: 020 3974 8812
E: hello@plan-net.co.uk
W: www.plan-net.co.uk

