

*"A helping hand when you need IT"*

CASE STUDY : Quintell

## Productivity in Business

A firm of independent financial advisers required fit for purpose computer systems and services to empower client relationship management, meet compliance requirements and improve productivity.



### CUSTOMER

Quintell was established in 1974 as a firm of independent financial advisers offering a wide range of services to individuals and businesses alike, in and around the Cotswolds, throughout the UK and elsewhere.

They cherish their hard-won reputation for imparting good advice; this has helped them grow a large and loyal client base. Clients trust their judgment and appreciate their ethical approach and the personal service they receive, which is honest, friendly and tailored to individual circumstances. Quintell are authorised and regulated by The Financial Conduct Authority and are members of Succession.

### CHALLENGE

To meet these regulations and in order to implement an updated client relationship model, Quintell needed help to bring their computer systems and applications in line with these goals. Mark Dancer commented that the company was hoping to "receive advanced technical expertise, strong commercial support and a phased implementation with training from a provider with small business expertise, knowledge of FSA / FCA IT compliance and a solution the company could build upon and trust in".

Quintell were unhappy with the mix of outdated home & business computers and workgroup solution from their previous IT supplier, that worked very slowly. The complexity of new systems and gaps in internal knowledge concerned the Directors that a viable solution could be reached.

### SOLUTION

Having heard good reports about Lazenby IT by word of mouth, Quintell decided to hire Lazenby IT to complete a review of current systems and services and produce recommendations on how to meet compliance regulations. They found the proposal understandable to non-IT people, fit for purpose and cost effective in comparison to the previous supplier's option.

Quintell have been impressed with the attention to detail, the care and phased approach to install a new server with uninterruptable power supply, backup solution and secure internet connection with remote access. Lazenby IT interacted well with current providers, even saving significant mobile phone costs in the process.

This included advice to consider document management solution Virtual Cabinet from Lindenhouse. The increased efficiency when dealing with client calls is significant and

has enabled a new level of professionalism and will over time allow the removal of paper based client documentation. Integration of Virtual Cabinet was achieved with Avelo financial CRM via a database upgrade which Lazenby IT project managed with minimal interruption to service.

The final stage was the replacement of old laptops running Windows XP and Office XP to All-in-one computers running Windows 8 and Office 2013 with training. The migration process was superb and the reservations of using the new technology and versions were unfounded. In fact, the touch screen was in use within 20 seconds and "are a joy to use" [Mark Dancer]. He also commented "my workstation is far more efficient and not having to take a laptop home (as all the work is done) is an unexpected bonus. Better posture and a large screen has rid me of the strain of using a small screen with integrated keyboard so much so that back ache of many years has subsided, a better result than I could've dreamt of."

"LazenbyIT is business focused with excellent IT skills that have rejuvenated our business and given us all more time to seek new clients, spend less time on computers and more time with existing clients. **Quintell recommend LazenbyIT services to similar independent financial advisers and any small-medium business.**"