



## A compliant platform for growth

Christchurch Investment Management Ltd (CIM) is an independent firm of specialist financial planners and portfolio managers, whose aim is to provide their clients with entirely unbiased and professional advice. An FSA regulated firm based in Moorgate, London, CIM employs a team of 20 people, the majority of whom have been with the company for many years and offer a wealth of knowledge and experience.

### Business challenges

Christchurch Investment Management (CIM) had been working with the same IT services provider for the past nine years, their technology platform was at the end of its life and were reviewing their IT strategy for the future.

Keith Perry, Chartered Financial Planner at CIM explains, *"The service from our existing supplier had become a bit tired. In particular their first line support was moved from the UK to South Africa which created a few problems. The internet connections with South Africa were unreliable and there were some language issues when trying to get IT problems resolved."*

In addition to these challenges, CIM had been considering a move towards a cloud-based IT solution. Perry continues, *"Our existing supplier was comfortable with a 'fat client' approach, with all the servers and desktops located in our premises, but we were in favour of cultural change to move to the cloud as we wanted a more robust and up to date technology platform. CIM were used to implementing a full refresh of their technology every three years, and this time they were keen to implement a 'thin client' solution that would enable all their staff to work remotely and would free up the office premises from servers and other computer hardware."*

### Selection

CIM's first contact with Lanware was a cold call. From that point onwards, Keith Perry was impressed with what he heard. He says, *"I liked the fact that they specialised in our area. Lanware concentrate on the investment sector and they seemed very familiar with the compliance aspect of the business. They were very strong on the Citrix solution and on hosted desktops."*

Perry comments, *"What impressed me about Lanware was they were sensible, professional, knowledgeable people. It was a case of quality over price. They were relatively local and their first line support was UK-based. They offered a cloud-based solution and basically they pressed all the right buttons for me."* Perry sums up the selection process, *"We looked at three suppliers, including our existing provider, for a cloud-based solution. We used the Lanware template, including a visit to their Level 3 data centre, as a guide. Ultimately, after reviewing the different options, Lanware walked it."*

### Highlights

- A new cloud-based solution that completely meets their specifications
- New system was installed to schedule with minimal disruption
- A hosted desktop system with servers offsite
- Built-in disaster recovery
- Email archiving provides enhanced FSA compliance
- Enhanced first line support

 *"Lanware is able to concentrate on helping us when we need it and give us their full attention. They understand how we do business."*

## Implementation approach

CIM had always replaced their IT system completely every three years, and even though this time they were planning to move to a cloud-based system with very little hardware, the approach remained the same. The key to the new system was replacing the company's Internet connection, which was previously too slow and didn't have the service guarantees to accommodate a thin client, cloud-based approach. CIM chose a new 10Mb Colt internet connection linked to a 100Mb output at the data centre, and Lanware managed the entire Colt Internet process which consisted of several transactions with several parties and took a significant amount of effort.

However, once the Internet connection was installed, the transition process to the new system was very smooth. Perry goes on to say, **"We had very minimal integration issues. Even though our team are not 25-year-old tech whizz kids – we are looking at 50-55-year-old financial planners here – there were no problems adapting to the thin client approach. It was all done in a working day, on the Friday. We were fully functional within minutes on the Monday morning without any problems."**

## The solution

Now everyone in the CIM team has a desk-based thin client, or they have their own desktop computer at home or use an iPad, rather than a laptop. With the previous system people had used laptops with a docking station. The new solution is much more flexible and suits the culture of the company, in which many people work at home or at other sites for large periods of time.

CIM now use Citrix Zen Desktop, which is very similar to what they had previously, so they have not had a massive learning curve. This version is cleaner, faster and is more suitable for mobile devices and tablets which has made everything much more accessible and led overall to a richer user experience. CIM use a number of web-based investment administration applications that suit the cloud-based system really well. They took their existing IT solutions to Lanware, and have made them work in the new environment.



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## Benefits

In terms of the benefits of CIM's new system Keith Perry says, **"Lanware's support has been excellent. They are UK-based, local to us in London and they use English as their first language which is a big advantage over our previous supplier. I have met the support team and I know who I'm talking to. Lanware has a very professional structure and are prepared to go the extra mile for their customers. We had someone working at weekends for us in order to get everything ready for installation on 1st August."**

Perry continues, **"With the new system, technology problems have very little impact on my working day. We now have a more robust set up, and thanks to Lanware's support structure there has been a dramatic improvement. Having a hosted desktop solution with offsite support means I can be far less involved."**

Now that CIM are working with the new version of Citrix, Lanware's support team can log on immediately to the system and CIM simply have to give them permission – which takes seconds. They can do that from anywhere too, so people don't need to be in the office if something goes wrong.

 **"We can be confident that our new security levels will satisfy the FSA."**

One of the key benefits of this project has been the standard of support that Lanware has provided. Perry explains, **"Because they are better resourced than our previous provider, they are able to concentrate on helping us when we need it and give us their full attention. Lanware understand how we do business. They are involved in the financial**

**services sector and discretionary finance management. We talk the same language and that makes things so much easier."**

Perry continues, **"As an example, as we are regulated by the FSA, compliance is a big issue. We have to be certain of security, and the FSA regulations are quite arduous. We need to be seen to be using a good level of encryption. Lanware understand that, and we now have a third level of security that we didn't have with our old system. We now have username, password and a secure login on this new version of Citrix."**

**We can be confident that our new security levels will satisfy the FSA."** Disaster recovery is another big benefit, as Perry explains, **"With a hosted desktop solution and servers offsite we have built-in disaster recovery. The important kit is away from our building, so we can access them remotely. Before we were vulnerable, now we are secure. That was one of the major factors that helped us make the decision to move to a cloud-based solution in the first place."**

They have even benefitted from an additional service that they weren't originally aware of. Perry explains, **"Another bonus for us has been the email archiving system. This was not in the original specifications, but Lanware offered it to us in the course of the implementation. This has given us a much higher level of confidence in terms of compliance. We have full access to our email archive if we need it. The Cryoserver system proves we have an audit."**

 **"I had high expectations, and they have been met. That's probably as high a commendation as I can make."**

## Summary

Christchurch Investment Management Ltd now has a thin client cloud-based IT infrastructure that exactly meets their requirements, and was delivered on time.

They are delighted that it now gives the company scope for expansion as they choose to develop their business going forward. Perry comments, **"If we do decide to grow our service, our new system has built-in future-proofing. The infrastructure**

**is very easily upgraded, which means that we could accommodate new advisors and even new sites without any fuss."**

When asked to sum up the experience of working with Lanware, the Chief Financial Planner concludes, **"The key thing is Lanware hasn't disappointed at all. They have literally delivered what they said they would deliver. I had high expectations, and they have been met. That's probably as high a commendation as I can make."**

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