

Viable Partnering: Finding the Perfect Tech Team through Outsourced IT

“ To keep up to date with the fast-paced, rapidly moving tech industry ... you need a whole education to do that!

With new viruses, new malware, new software, new tech advances coming along all the time, **you need people who are going to relentlessly keep up to date with it.**



By outsourcing our company IT to ITSOL, all of this is taken care of for us.

We wouldn't have it any other way. ”



BERNADETTE RENDER

Practice Manager,
PenLife Associates.

The Client

PenLife Associates is a reputable York-based, privately owned firm of Independent and Chartered Financial Planners providing straight-talking, no-nonsense **financial planning services** to people across Yorkshire and beyond.

With over two thousand clients, nine professional financial advisers, and thirty staff, for the past 35 years they have been attaining profitability and financial value for their clients.

“We help our clients with their financial preservation and financial growth, with the aim of attaining and maintaining their chosen goals and lifestyles.

We ensure we're a viable financial partner to our clients.

And in the same way, ITSOL is an exceptional and viable IT partner for our business.

They provide us with the backbone for all our tech needs; help us to attain and maintain our IT objectives, and are an integral part of our business's growth through their invaluable strategic IT input.”

The History

ITSOL has been the IT provider of choice to PenLife for more than 12 years.



“I have been at PenLife for the past ten years, and ITSOL was well established with the company as its preferred provider. When I joined, all of **the IT systems were already firmly and decisively in place through ITSOL’s efforts.** And it made it very easy to pick up working within the IT infrastructure so seamlessly,” says Bernadette.



“The same continuity and care is part of who they are, and it is applied every day and in every interaction”.

She adds that the tech support is multi-faceted – there is the day-to-day assistance, as well as ITSOL’s proactive, strategic, and mentorship roles.

“They help us to make the Big decisions

as well as being the reliable and dependable ‘safe pair of tech hands’ support.”

PenLife’s preferred way of managing their IT is to outsource their tech needs. This is where ITSOL has proved a vital asset.



They have forged a long-standing relationship that works successfully. “We don’t ever have to feel nervous or worry about anything tech-related, as we have deep trust and unequivocal ‘knowing’ that ITSOL looks after all of this for us without hesitation”.



“We need an IT partner who are able to meet a quick-changing business environment with a proactive approach in monitoring our system to prevent any issue before it occurs. We have this in ITSOL”.



As a wealth management company, PenLife requires an IT strategy and approach which enables and enhances business growth. It also needs to reflect user needs, foster change, and respond and adapt rapidly to the ever-changing digital world.

In addition, in today’s Covid world, ITSOL’s immediate and proactive response in setting up PenLife’s tech needs for “remote working and the ‘new normal’ has been outstanding”.

“An invaluable, inherited business relationship that grows and goes from strength to strength”.

The Challenges

There are 2 core challenges for PenLife when it comes to their business IT:

1 The tech arena itself:

Keeping up to date with the fast-paced, rapidly-changing, ever-moving tech industry – “You need a whole education to do this!” This includes all of the essential cyber security measures that are needed.

It also includes new tech advances, new and useful software options that come along all the time – “You need people who are going to relentlessly keep up to date with it”.

“ITSOL always suggest new ideas, products, and best practices. It’s all taken care of for us. We wouldn’t change this for anything”.

2 The financial services sector tech complexities:

In line with the client market of PenLife, whether it is pre- or post-retirement, financial planning that adds real value is often more complex.

“The more intricate a client’s case, the more complexity you are dealing with.

And the more complexity within the financial planning, you then require IT to match these demands.

Finally, it needs to be simple to use – within these complexities”.



And this is where ITSOL comes in with their client-focused, industry-insider, knowledge-driven, fully managed IT provider services.

ITSOL provides IT support in multiple ways – from everyday problem-solving, to strategic boardroom decision-making.



This overarching approach to managed IT service provision enables PenLife to concentrate on developing their own business rather than having to worry about maintaining IT systems, and making big IT choices.



Robert Hedley
Director, ITSOL

“The ITSOL Directors are also on our leadership team. And we call David one of our mentalists!

Robert and David get involved in our business planning days and bring in new angles and fresh insights from an IT Director’s perspective.

Their viewpoints and insights that are a combination of general business leadership as well as being accompanied by IT knowledge.

It really helps us to shape where we are going.

Strategically, they are part of our team”.

Strategic Direction & Visionary Advice

“Whenever we speak to the directors, **they’re very good at cutting through our needs.**

This is a great thing because **they make it so simple.**

They understand our mindset.

And we need simple, snappy solutions that can be rolled out across thirty staff anytime there are changes.”

Strategic Direction & Visionary Advice

One example of ITSOL coming forward with new approaches to improve business operations was a **MOVE TO CLOUD COMPUTING:** ITSOL reassured PenLife about moving their infrastructure to the cloud. They did full due diligence, and put PenLife's mind at rest.

“Now we are sailing with it, and we haven't looked back. It was a great decision to move to the cloud, all prompted by ITSOL who worked through any resistance to change with care, and took us on the journey to have all of us on board with the process.

This inbuilt trust in ITSOL's strategic guidance, leadership and implementation comes from the years of working together and seeing the successful end results time after time”.

Another example involves the **IMPLEMENTATION OF PENLIFE'S CLIENT PORTAL:**

This has helped PenLife meet its own IT growth and response to the wider marketplace, but in turn it benefits their clients too. “ITSOL is happy to extend some services to our clients too, and this offer is fabulous for our company, as it adds tech support, by extension, for our clients benefit”.

DOCUMENT STORAGE AND BACK OFFICE:

ITSOL helped PenLife evaluate new systems and make the right decisions on back office and documentation needs.

MICROSOFT OFFICE 365 ECO-SYSTEM:

Using the Office 365 eco-system to create process automations and applications for PenLife.

Complete efficiency for saving time in managing the flow of information between individuals and teams within the organisation, while also improving compliance and discoverability of data.

It harnesses the deep integrations between Microsoft Office and Microsoft's cloud services such as SharePoint, Power Automate, Power Apps and other third-party integrations. This allows ITSOL to create bespoke process automations which adds value to Pen-Life's business and reduces the cost of administering their clients.

ITSOL provides highly resilient infrastructures for PenLife and all its clients as part of the whole service package.

SEEING THE SEA-CHANGE:

“In our industry, a sea-change is coming with regulatory technology and how these all need to be integrated. THIS IS A BIG ONE - to link up software - and we'd naturally look again to ITSOL to guide us through these big decisions.

It will be crucial for ITSOL to be in the conversations and planning right from the outset, and we are in no doubt that together we will achieve the right outcomes”.

Day-to-Day Tech Support

It's a multi-layered approach: From the Helpdesk facility, to a team actively monitoring and remediating any alerts that may arise, and a professional services team for all onsite needs. All requests or alerts are managed end-to-end, including third-party management through to resolution.

UPGRADES AND UPDATES

"ITSOL always work on these 'backstage' with no disruption to our daily business operations. Upgrades and anything else is fitted in seamlessly in the background, which is fantastic as there is no disruption to our work flow".

ONGOING IT SUPPORT

"Day-to-day support is quickly managed and dealt with. Sometimes items are solved within seconds, which is vital for us.

It's always a quick response by the ITSOL support team. **They are always helpful, and just unbelievably good.**

You just know that **they are going to do the best for you all the time** – the whole team, from the support team and all the way through the company to the directors.

You don't ever feel like you need to chase anything, and this is a Big thing for me with third party providers – no nagging needed, no time lapses.

With ITSOL you can pass on an item to IT and **you can simply trust that it's being dealt with,** you don't have to pester or chase".

Problem-solving



This is usually around matters to do with problems 'in the chair and not in the computer' and "ITSOL are wonderful at hand-holding and walking us through any operational issues we experience – things as simple as 'my email looks different and I don't know why'.



They go above and beyond constantly, even over weekends at times, and with help outside of the normal scope, such as with home IT not related to work".



It goes without saying that **people are at the heart of ITSOL,** and they recognise that people are at the heart of their client's businesses too.

"This is an enduring quality of ITSOL and the whole team".



Remote Working

"ITSOL's efforts were beyond expectations when it came to lockdown early in 2020. They set us up with everything we needed in order to work from home, and driving the whole process. Their insistence made sure everyone had what we needed".

At all times, everything was coordinated and implemented behind the scenes so that there was no disruption to PenLife's business working day while it was all being put in place.

"We just see the easy, simple results, that's what we see as the client. But we fully understand and appreciate that there is a trick to making the whole burden of setting everyone up to work from home look easy.

But we know that behind this there is a lot of effort from ITSOL's part".

Successful Outcomes

These are multifold and include some key areas:

WORKING FROM HOME:

Through arranging for PenLife and its team to work from home comfortably and effectively during 2020, it indirectly saved the business overhead costs. This is especially applicable to smaller firms who are re-examining their need for big office spaces.

RECRUITMENT:

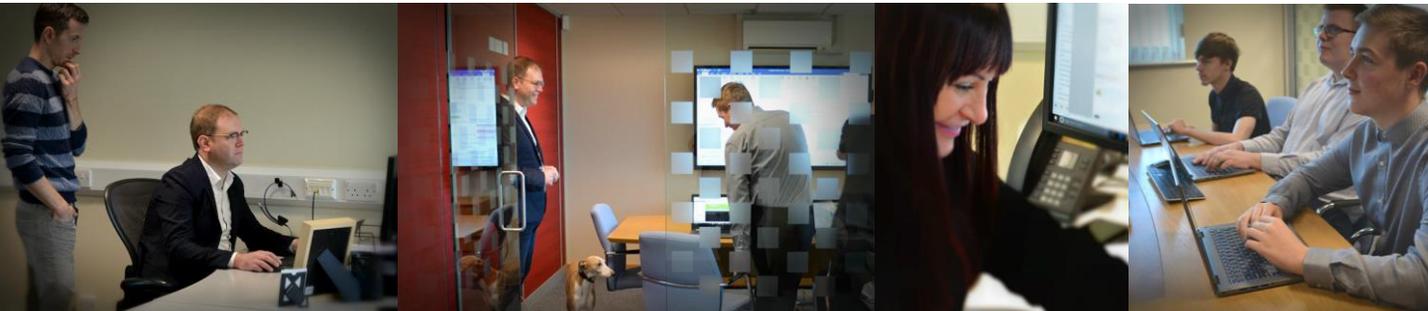
PenLife recognise that there are significant savings in outsourcing IT with regards to employing a salaried in-house team. "It isn't easy to find the right people for the IT demands we require when it comes to employing an in-house team".

OUTSOURCED IT:

"We'd opt for an IT outsourced department vs in-house as our preference, without a shadow of a doubt.

ITSOL know and understand our business, and also financial services so well.

To find an internal tech team like this would be impossible".



Since the start of the partnership with ITSOL's IT services over a decade ago, PenLife continues to harness the right technology at the right time through ITSOL's energy and efforts, to accommodate its growing customer base and services, and supporting growth.

"Without question, PenLife will continue our preferred, long-standing partnership with ITSOL".

There are the benefits of ITSOL's tech industry knowledge, and insider industry expertise specific to the financial services and wealth management demands.

And PenLife's whole team matters too when it comes to their use of tech in the workplace, and it is strongly positioned to deliver even greater value to the business.

As our technology changes and evolves, ITSOL's support is vital.

Of Particular Note



We are most impressed with the whole ITSOL team, and the speed of their service. Nothing is too much trouble.

Their IT knowledge and tech insight allows them to act quickly and very efficiently.

The whole PenLife team, everybody is always impressed with everyone they speak to from ITSOL.

They are reliable and you can count on them to be there for you. Nothing is too much trouble, and this is a very big thing when we are going about our own busy days – just knowing that they will be there when you need them.



In the words
of PenLife's

Bernadette Render:

“On a personal note – and I can speak for others in PenLife too – ITSOL is not just an outsourced IT company. I feel I've got friends as well. It is relationship based.

We have a laugh, we have fun. Everybody is very personable. It doesn't have to be business-like all the time. So, personally, I really enjoy these relationships.”

“As a business we're a friendly bunch too at PenLife, so it's reflected both ways, and it doesn't affect our professional work when we share a joke or two. Sometimes this even happens while we're on the phone to have an issue sorted out. Before you know it the problem has been solved while chatting about something else!”

“There are demanding and exciting times coming in the near future for the financial planning sector, so it is imperative to have a team that knows you so well.

ITSOL is the team for us”.



Would you like to learn more about what ITSOL can offer your company?

We'd love to hear from you and you are welcome to speak to

David Littleboy and Rob Hedley on 01924 383250 or email it@itsol.net