

Case Study: one of our customers within the financial services industry

RH Financial Consultants Limited are a growing independent financial advice business who, having **outgrown their aging IT and communication system**, were concerned by downtime and problems with their telephony which was resulting in an **inefficient office** and more importantly, **hindering the level of service** they wish to attain. There was further concern with regard to their web presence as they recognised that potential clients may be **put off by a website** that did not reflect the quality of products and services that they offer. As the business evolved, new IT resources were purchased as and when required. This evolution, however, resulted in the use of differing operating systems and **numerous incompatibilities** meaning even simple file shares could not easily be set up, if at all. Both legacy and new paperwork was scanned, stored and backed up to on site hardware. This left the **data vulnerable** to becoming corrupt, damaged or deleted; accessing this data proved more difficult still, without a simple way to archive and make the information available at a later date.



Richard Hancock

"I was delighted with the advice and assistance from Neil at Zone. He provided a true one stop shop which addressed all of our needs in respect of updating our telecommunication and IT systems with a true understanding of the requirements of a business operating in the financial services sector. I would not hesitate to recommend him to anyone"

Taking advantage of opportunities created by the increased regulation in the sector, RH had changed their business model to expand the business using self employed agents. However the existing telephone system was **unable to support this growth** owing to the **inability to make or receive multiple calls** at any one time. This **inefficiency hindered productivity** and service levels and left unchanged could have **seriously impaired the growth plans** for the business. A planned office move created further problems as the existing fixed landline number was unable to be transferred to the new site using the traditional telephone network as a result of it being serviced by a different telephone exchange.

The nature of the financial services industry means that the majority of agents are out in the field for more time than they are in the office, meaning, access to secure email on the move is essential. The existing website and email domain made this an almost impossible struggle as the details and settings could not match the requirements of a modern mobile workforce. Added to that there were several further challenges to overcome:

- Agents using a variety of individual mobile tariffs and handsets causing **unnecessary overspend** and slow or missed responses.
- The existing website was **clunky and difficult to navigate** for clients potential or otherwise, conveying a poor representation of the company. It was also incompatible with new referring plug ins as well as being outside of FSA compliance guidelines.
- The branding and logo for the business was also in need of a refresh and it was decided that it was an opportune time to review this.

In summary, Zone was needed to provide the business with **objective practical advice** and assistance in setting up new landline and IT systems along with a review of its online presence and profile.

RH Financial Consultants



Organisation size

5 employees, 3 advisors & 2 admin

Organisation profile

RH Financial Consultants offer financial advice to corporate and private clients across the UK based from their head office in Sheffield.

Website address

www.rhfinancialconsultants.co.uk

Business situation

An overhaul of the Communication & IT system plus a refresh of their online presence was required.

Zone can help you.....

- ✓ Make your mobile and landline phone technology work better
- ✓ Ensure you are on the best package by reviewing tariffs and your usage
- ✓ Improve your online presence, including your use of social media
- ✓ Streamline your IT systems by advising and implementing cloud computing systems

How did Zone Business Solutions help?

Zone had an initial meeting with RH to discuss their existing systems and challenges as well as their needs and requirements going forward. Following these discussions Zone provided RH with a detailed proposal setting out solutions to each of the issues.

To resolve the issue of incompatible systems, software and document sharing, Zone created a **'common operating environment'** using a cloud IT system known as Microsoft Office 365. The SharePoint element provides a central document repository allowing users to **store, share and edit files securely on an, FSA compliant, Microsoft internet-hosted file server.** RH's employees can save files directly to SharePoint and access files using any web browser, even **editing them online** using Microsoft Office Web Apps. the incumbent email server was replaced with a new **cloud-hosted system** which not only gave the entire company secure access to their emails from Outlook, but also lets them **easily share diaries and contacts.** As with SharePoint, they can access the system from a web browser or even a smartphone.

Implementation of a hosted IP telephony system, provided the ability to **retain the existing telephone number** irrespective of geographical location, avoiding what would otherwise have been an expensive exercise in call redirection and charges. Sophisticated features such as SIMRing or Find-me-Follow-me, provided the ability to **route calls to desk phones and or mobiles** and created pick up groups within the organisation to make switching to different users easier, meaning missed calls are greatly reduced. Other features such as **call recording, voice menu options and personalised greetings** are part of the system and can be made available remotely, without the need for expensive onsite engineering cost. Another key benefit of IP Voice Services is that **expensive hardware is not required.** Any equipment required can be bought for very little upfront cost and **monthly costs are often lower** than a similar system using traditional telephony.

As the workforce are mostly mobile, it is key to be able to route unanswered calls from the office landline to individual mobiles to ensure that customers always have access to their adviser, Zone ensured that this was possible. Additionally each mobile was upgraded to appropriate smartphones so that they can now **access company email** to both send and receive messages as well as create and check shared diary entries. The individual tariffs were reviewed and merging company mobiles on to a single group plan has resulted in **significant cost savings** and an **easier to manage system.**

A **new website** was designed by Zone which not only looks **more modern** but has more customer "calls to action". The site is **secure and FSA compliant,** customer friendly, easy to navigate and is optimised to work with search engines to make it easy to be found by potential customers. **A new logo** also brought the company's image up to date and in line with its new aims and ambitions.

Social media is also an essential to the modern business and Zone advised and introduced a **Twitter feed** to the site to easily add fresh content to the website. Zone provided advice on how to **get started with social media** and RH have found it simple to create new articles as well as re-tweeting other relevant industry articles.

Solutions provided



Orange Business mobile package



Microsoft Office 365



Polycom IP telephone system



SSL Secure website



Twitter feed integration

To summarise,

Zone addressed the needs of RH's communication, IT and telephony needs providing cost effective, practical and creative solutions designed with a true understanding RH's needs and aims.

*"Making
technology work
better in your
business"*

How do I get more information?

Call us on [0114 229 9132](tel:0114 229 9132)

We look forward to helping you make technology work better in your business.



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