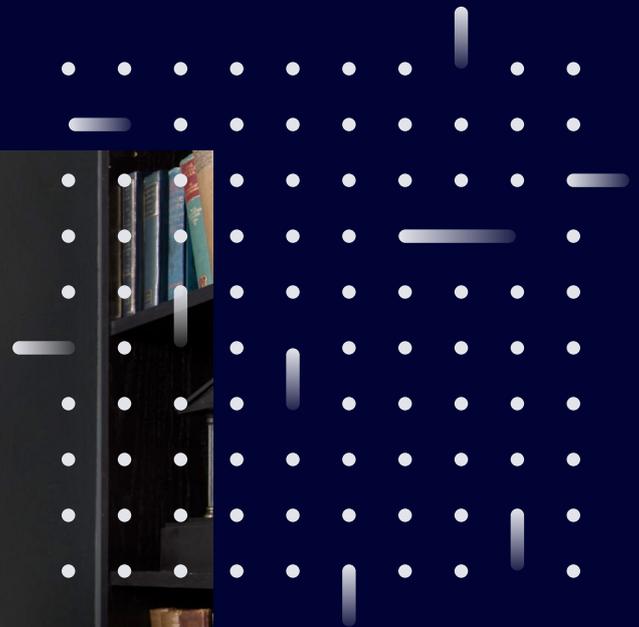
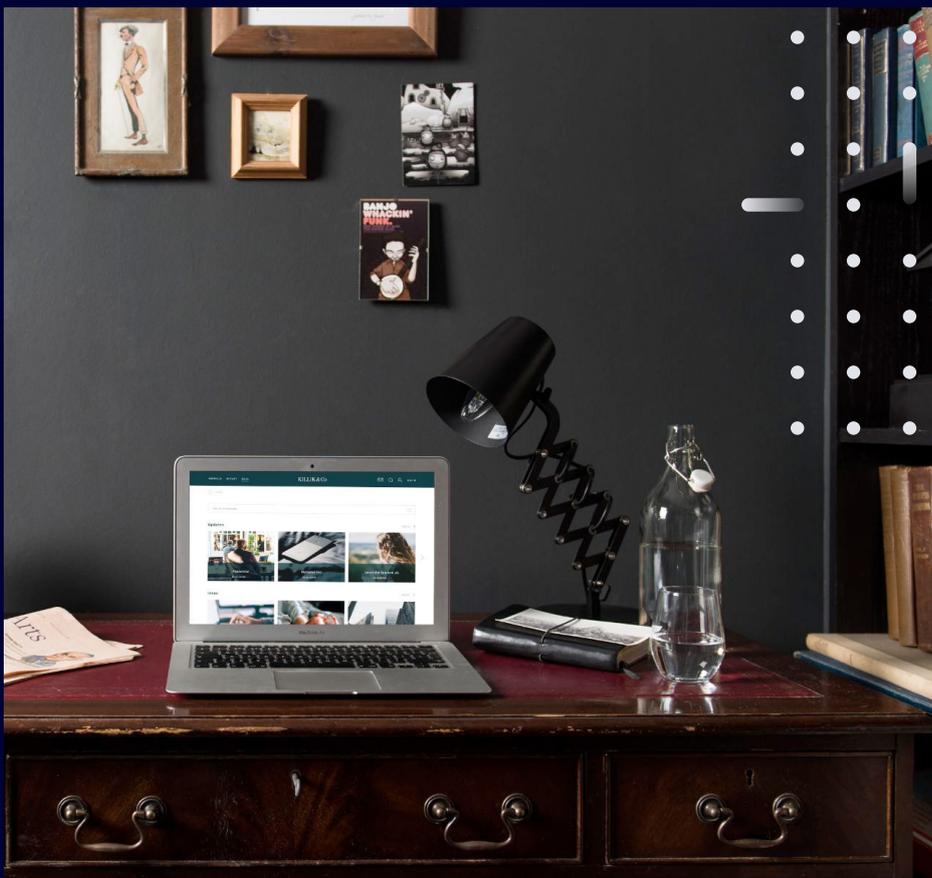


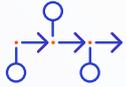
Case Study

# Killik & Co

Forfusion enable better employee mobility and secure communications for award-winning financial advisors



Collaboration



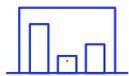
## Forfusion's timeline

01

Collaboration and Communication programme 3 months

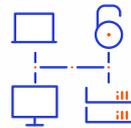
02

Ongoing FusionCare customer



## Killik and Co Statistics

- Founded in 1989
- 8 branches in London
- Multi-award-winning since 2013
- Sponsors of the annual prestigious Killik Cup since 2011



## Collaboration and Communications Solution Components

- Cisco Hosted UCS Platforms firmware
- Integrated Management Consoles
- VMWare ESXi Hypervisors
- Cisco Unified Communications Manager
- Cisco Jabber
- Cisco Unified Border Elements
- Cisco Expressway Series
- Cisco Webex Teams and Meetings

# Background

London-based independent investment house Killik and Co have been providing discretionary and advisory wealth planning services since 1989.

Priding themselves on excellent customer service and competitive investment returns Killik and Co offer unbiased expertise and integrity to private clients all round the world.

## Collaboration Communications Legacy

Originally Killik and Co were operating a Cisco network with Microsoft collaboration products to handle call control, telephony, instant messaging, voicemail and appointment scheduling. At the time their product suite included Cisco Unified Communications Manager, Cisco handsets and both Microsoft Lync and Exchange.

## Mobile working and Customer Service Problems

With business growth came the need for increased employee enablement and mobile working, but the existing environment couldn't meet the demand.

New applications were being adopted, resulting in a sprawling comms infrastructure that was not delivering a good experience for Killik and Co's users.





## Better Communications and Mobile Working Requirement

Quite simply Killik and Co needed their communications and customer service systems to keep up with the demands of the business.

They required a technology platform that would reliably support their mobile workforce and fulfil their high standards for impeccable customer service.

Also, in the words of Dan Young, Killik and Co's Head of IT and Operations:

"We needed to stop being so reliant on email!"

To achieve this Killik and Co also recognised they needed a dedicated technical partner to advise and guide them in their choices and IT investment.



## Why Forfusion?

Through the implementation of multiple discrete technology projects, security improvements and Wi-Fi upgrades, Forfusion had built a good reputation with the financial company.

So when the time came to choose a technology partner for the overhaul of its Communications and Scheduling systems, Killik and Co knew that Forfusion would fit the bill.

As Dan Young explains:

"We were looking for a trusted partner whose expertise bolstered our own in-house knowledge and who could offer the best advice on a consultative level. Forfusion offered the un-biased guidance we needed to choose the right solution to our challenges."

## Collaboration Solution Approach

Ian Musgrave, Forfusion's Project Lead for Killik and Co., comments: "When Killik talk to a client they start by asking 2 things - 'What is it you would like to achieve?' and 'How would you like to work with us?' And that was our approach to Killik too."

### 01 Access

Ian says: "As we were familiar with Killik and Co's IT environment the first step was requirements analysis."

"Killik attended a number of requirements gathering workshops facilitated by our PMO and expert delivery team. From here we could move into high-level design."

### 02 Design

"As part of the design phase we invited Killik to visit the Cisco Executive Briefing Centre (EBC) in Bedfont Lakes, allowing them to see demonstrations and get hands-on with the latest portfolio of collaboration solutions and hardware," Ian explains.

### 03 Integrate

"In the interests of familiarity, ease of adoption and functionality futureproofing, Killik decided to move forward with the Cisco solution. This would also interface well with their existing Cisco network infrastructure."

"Killik liked that Cisco offered a seamless unified communications and web conferencing environment, accessible from a wide range of end-points, including Apple devices," Ian says.

"We ran a successful proof of concept exercise to introduce the web conferencing tool, which at the time was called Spark. It's now known as Webex."

"Cisco Jabber was chosen to replace the previous Instant Messaging & Presence solution. This offered great integration advantages with the Cisco handsets, whilst also allowing file transfers, calendar and meeting updates into Microsoft Exchange."

### 04 Operate

Post implementation Killik benefitted from FusionCare, Forfusion's managed service, which gives 24/7, 365-day customer support across all the collaboration elements deployed in the project.

Killik also opted to have their wider network and security estate covered within the service package.

Recognising the significance of this support, Dan Young says:

"The FusionCare managed service has enabled us to have a trusted partner on-call whenever we need them, ensuring we can deliver the service our clients expect of us no matter where they are contacting us from."



## Collaborative Comms Outcome and Benefits

### Successful implementation

Web conferencing, the CUCM upgrade to version 12, the integration of Call and Calendar, and the installation and connection of mobile and remote access tools were completed on time, and as per the system brief and design.

Forfusion delivered the whole project focusing on seamless migration from pilot phase to full production, ensuring zero downtime and minimal operational impact. Commenting on the benefits realised so far,

Dan Young says:

“We have significantly reduced the number of support tickets raised, which has resulted in substantial time savings for us and the ability to remain focused on our clients, rather than systems.”

### New Efficiency and Peace of Mind

FusionCare adds 24/7 peace of mind that Killik can support its clients wherever they are in the world; and with greater internal efficiencies, better workforce mobility and secure communications, the Killik team is living proof that email isn't everything!



## New Possibilities

### Continuous Improvement

Through system performance tracking and monitoring, FusionCare enables deployment optimisation and ongoing benefits measurement. Killik now has a systematic way of identifying and demonstrating continuous improvement.

### Getting the finances right

Affordable financing was key to solution accessibility for Killik and Co. Cisco's enterprise agreement model provides licensing under a single manageable agreement. Forfusion combined this with Cisco Finance to wrap a complex contract of CapEx and OpEx expenses into a simplified, OpEx payment plan with 0% interest.



## Client Feedback

The last word goes to Dan Young:

“Forfusion had the expertise and skills required to implement the changes we needed, but more importantly they were a safe pair of hands for Killik.”



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