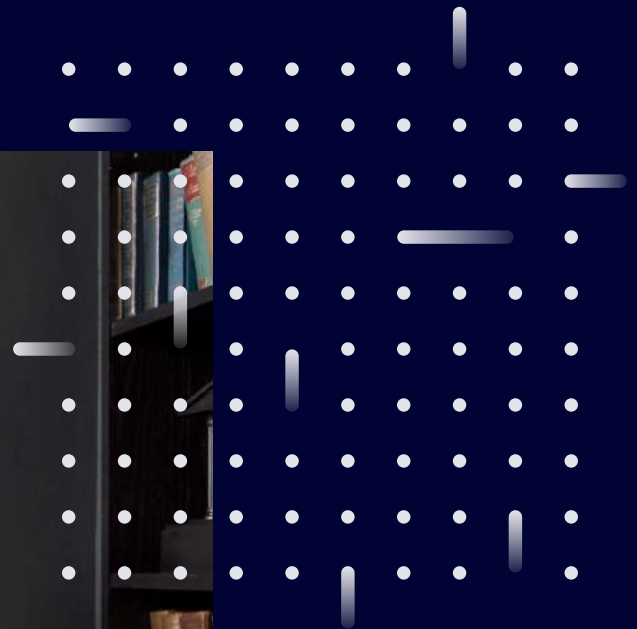


Case Study

Killik & Co

Mitigating operational risk and enabling secure remote working, providing design, integration and support services for Cisco Collaboration technologies.



Collaboration

Background

Established for more than 30 years, serving clients through delivering competitive returns and exceptional customer service is always central for award-winning financial advisors Killik & Co. With 9 different locations across London and the south east, headquartered in Mayfair, they offer un-biased expertise and integrity in the world of financial advice and services.

In order to serve their clients, Killik recognise the essential nature of technology road mapping and setting an IT strategy that will deliver the security, accountability and flexibility essential to delivering a first-class service now and well into the future.

It was in 2014 when Killik first became a client of Forfusion, they were looking for a partner who understood the intricacies of seamlessly integrating the two leading communications vendors; Cisco and Microsoft. Since then Forfusion have listened, advised and assisted them with the implementation of multiple technology projects and services including improving security and Wi-Fi and enabling superior collaboration both in-house across their different estate locations and externally with their clients.



When a hybrid environment became challenging

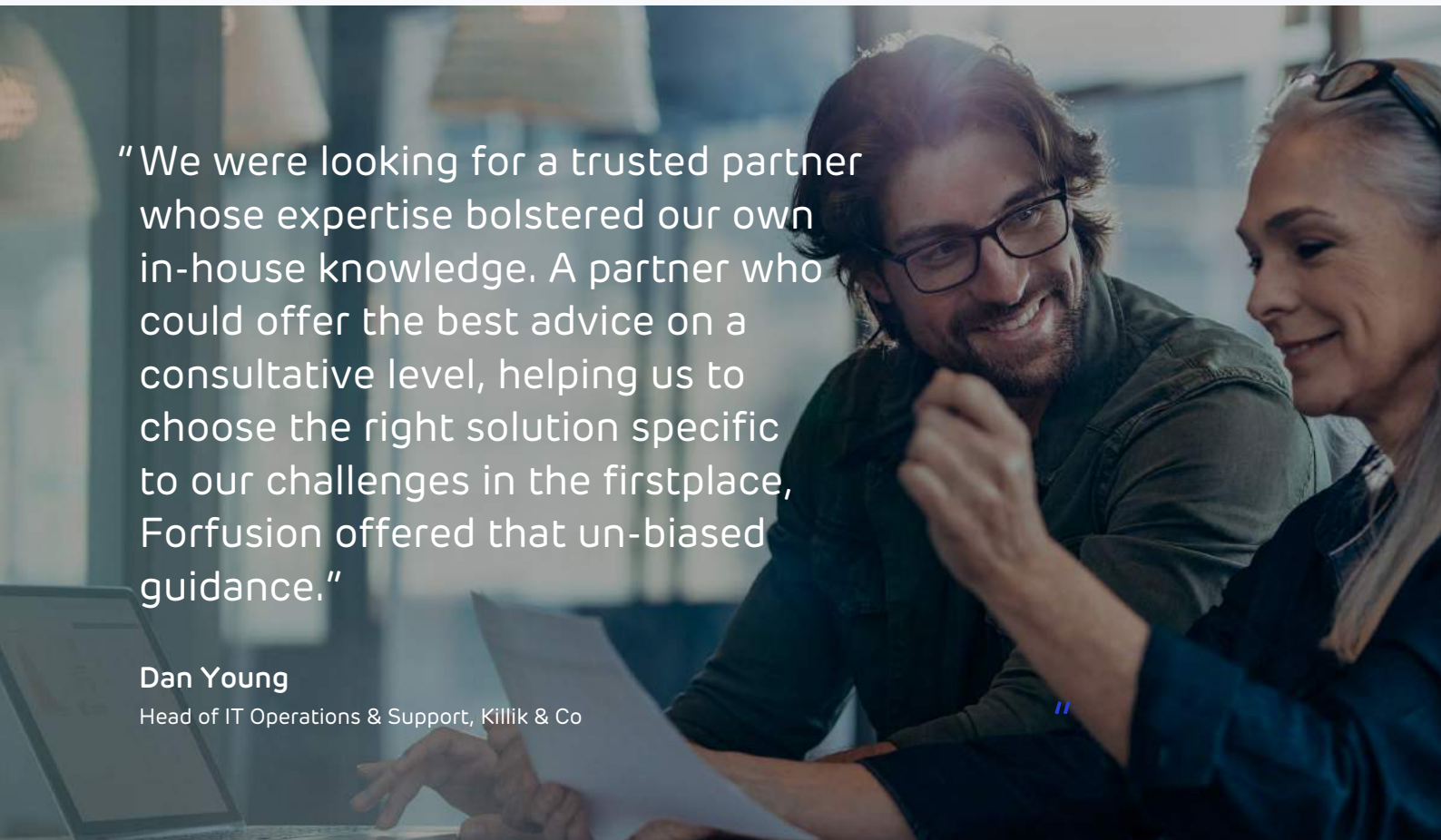
Like many organisations, the fast-moving pace of technology meant Killik were operating with systems which had previously delivered for them, but as their business grew and their adoption of new applications increased, they found some systems no longer aligned with what they needed to achieve.

They were operating a mixture of Cisco and Microsoft products and systems which had historically served their needs, but with an even more increased focus on employee enablement and mobile working, integration and performance had started to become a challenge for them. In order to continue to improve workforce mobilisation ensuring customer service delivery Killik needed to address this.

Existing infrastructure

Killik were operating a hybrid deployment; These incumbent systems just weren't delivering enough for Killik anymore. They required an up-dated solution that would deliver stability and reliability for the business.

- Cisco Unified Communications Manager (CUCM - v10.5) for call control
- Cisco handsets for telephony
- Microsoft Lync for instant messaging, presence and meetings
- Microsoft Exchange for voicemail



"We were looking for a trusted partner whose expertise bolstered our own in-house knowledge. A partner who could offer the best advice on a consultative level, helping us to choose the right solution specific to our challenges in the first place, Forfusion offered that un-biased guidance."

Dan Young

Head of IT Operations & Support, Killik & Co

A question of out-sourcing

At the same time as the increasing need to review their technology provision, Killik were also undergoing some internal changes with their own structure and personnel, the timing for this posed them with a very important decision around the best utilisation of out-sourced expertise. The outcome of this was their choosing to partner with an existing supplier who had the skills, experience and perhaps most importantly whom they trusted to bring the right solution to the table and manage the implementation for them.

Killik knew from their established relationship and from the projects we'd previously worked together on that Forfusion were this trusted partner.



Time to change

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?" It was time for Forfusion to ask the same questions of Killik. The conversation resulted in planning beginning in late 2017.

The project started with Forfusion providing an experienced delivery team led by their PMO to carry out the design and deployment tasks, at a high level, the stages of the engagement were as follows:

- Requirement gathering and workshops
- Solution Design (HLD/LLD)
- Create implementation and test plans
- Deployment and configuration
- User acceptance testing

Forfusion invited Killik to a number of planning workshops in early 2018, including a visit to 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.



The solution proposal

Forfusion proposed that a Cisco collaboration solution be adopted to overcome the existing issues and provide functionality which better fitted Killik's current and future requirements. Killik decided to move forward with the Cisco solution to better align with in-house skills, as well as interface with their existing Cisco network infrastructure. Cisco offered a seamless unified communications and web conferencing environment, accessible from a wide range of end-points, including Apple devices.

At the heart of the solution was WebEx Meetings and Teams which would provide a much more advanced level of capability in line with Killik's requirements. Cisco Jabber would replace the existing Instant Messaging & Presence (IM&P) solution, providing integration with new Cisco handsets whilst also allowing file transfers and Microsoft Exchange integration for calendar and meeting updates.

Forfusion provided Killik with a proposal and accurate solution pricing to enable financial planning for the upcoming financial year and beyond.



Implementation

The first step was introducing a new collaboration tool; WebEx Teams (known then as Spark) as a partner led proof of concept in early 2018, successful completion of the pilot paved the way for the main project which commenced in July 2018. The bulk of the project; upgrading CUCM to version 12, integrating Call and Calendar connect and installing mobile and remote access tools being completed on time by September of 2018.

Forfusion delivered the whole project focusing on seamless migration from pilot phase to full production, ensuring zero downtime and minimal operational impact. The project led to the successful deployment of all collaboration applications on-time and as per the system brief and design.



Getting the finances right

Of course, making sure Killik were happy with the finances was essential. Cisco's enterprise agreement model, where licensing for all the applications is provided under a single manageable license agreement was the solution. Combining this with Cisco Finance allowed Forfusion to wrap a complex contract of CapEx and OpEx expenses into a simplified, OpEx payment plan with 0% interest.



On-going service

In October 2018 Killik further bolstered their IT provision by deciding to take advantage of Fusion Care, a 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.


Enabling optimisation of all deployed tools through tracking of system performance, FusionCare helps Killik to track their use and measure the on-going positive effects the systems have for their clients.

Six months on

Implementing the changes with Forfusion has enabled Killik to improve their internal efficiencies significantly, allowing them to concentrate on delivering services to their clients without system issues getting in the way.

With a focus on supporting increased workforce mobility and communicating securely, Killik also instigated a proactive shift in internal usage habits and are making their organisation far less reliant on email; an organisational objective they were aiming to achieve.

The addition of the managed services contract has meant that Killik can have peace of mind 24/7. Working with many international clients, particularly those in significantly different time zones to the UK, it is important for Killik to maintain access to on-call support.



“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.

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.”

Dan Young

Head of IT Operations & Support, Killik & Co



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