



## Case Study

October 2004

### Remote Communications

#### The Business Challenge

Fitzallan Limited is based in the West of Scotland and provides fee-based independent financial advice to clients throughout the UK. The Firm operate in a market where customer service is paramount. The financial world is in a constant state of change with investors needing the most up to date information to enable them to manage and grow their financial portfolio.

Fitzallan identified that they wanted their Advisors to have real-time access to their information sources. This was a challenge as the Advisors spend a lot of time travelling around the country visiting their clients.

MCTS had recently installed a new IT Infrastructure into the company's head office. This comprised Exchange Server 2003 and Windows 2003 Server.

Fitzallan and MCTS decide to implement a mixture of technologies that enabled communication no matter where the advisors found themselves.



#### The Solution

First Outlook Web Access was installed. This allows Users to access their Microsoft Outlook software from any Internet browser. This could be from home, within an Internet Café, at a clients premises or even from their Laptops via a modem connection.

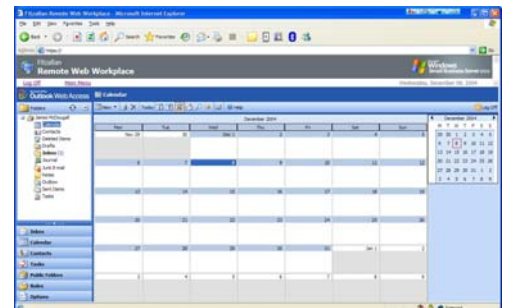
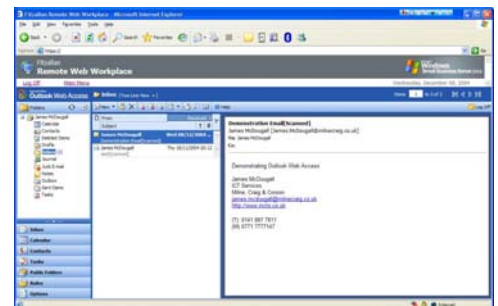
Then ActiveSync was utilised with M1000 Pocket Windows 2003 PDA devices. This technology automatically synchronises the Advisors corporate email over the GSM or GPRS Orange network directly to the small handheld devices—ensuring that they can respond to client requests almost immediately.

Lastly Microsoft Remote Web Workplace was configured to allow the users to connect securely to their company desktop computers from any available Internet Browser.

#### The Benefits

"This solution has met and exceeded the Business Challenge ensuring that we are able to react to market changes and thus offer an unparalleled level of service to our clients"

Gregor Johnston Director Fitzallan Limited



### About Fitzallan Limited

Most people recognise the need to organise and review their financial affairs, yet the sheer variety of financial products and services available is daunting, even for the financially aware, and investing the time and energy required to research them properly is, more often than not, simply impractical.

The desirability of good independent financial advice is widely acknowledged. However, concerns about the quality of advice on offer are, due to the many financial scandals and disappointments of recent years, widespread.

Fitzallan has been established with one specific objective in mind - to offer a service which, by addressing these concerns, gives our clients confidence that the advice and support they receive from us will be competent, comprehensive and utterly impartial.

How we achieve this is straightforward:

- we offer purely **fee-based** advice
- our advisers are experienced and highly qualified
- we aim to be clear, open and straightforward in everything we do
- our service covers all the main areas in which individuals are likely to need advice



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