

WPS Advisory

WPS Advisory are a firm of financial advisers delivering retirement advice and guidance on wealth management. Since their start in 2014 they have grown rapidly to become a large team with growing IT needs. We have worked with the business from the start.



The Client's challenge:

WPSA wanted an agile solution so they could work from anywhere. It also needed to be easily scalable as the company grew, whilst remaining cost effective. The solution needed to be implemented quickly. All of this whilst ensuring there was a strong focus on security.

What we did:

Having scoped their current set up, we identified that WPSA needed a solution that would work with a bespoke application they had written. They already used some of the Office 365 suite, so we recommended migrating to Microsoft Azure using a remote desk top solution. This option enabled all of the team to use their existing devices to login from anywhere. Additionally, by protecting the data with Multi Factor Authentication, we could ensure it remained secure. We set up protocols so all data could be viewed but

only saved within Azure, not onto any device.

Once we had installed the system we thoroughly tested it, including integration with their bespoke app. When we moved to the next stage - user acceptance testing - we identified a need for additional servers, which we delivered. Following sign off we migrated the data over a weekend, ready for launch on Monday. As always, we then provided training and user support as everybody navigated their way around the new system.

Results:

All staff were able to access the system from any device anywhere. Instead of needing to log on to individual laptops there was central control of user access, data security and any software updates. Adding or changing apps became so much easier.

The client is very reassured that the integrity of their data remains secure and intact, and it has given them confidence to work towards external accreditation. Equally, they have been able to test out their business continuity, during the recent lockdown, and ensure they can maintain business as usual.

What the client thought:

“Riven are brilliant at the high level IT strategic stuff. They keep pace with the growth of our business and make sure that our IT does too. We just never have to think about it, because they do that for us.

We recently migrated over to a remote desktop solution, which has proven to be an excellent decision for us. The current Covid challenges became a small temporary hiccup for our business, and we were easily all able to work remotely. If we hadn't had the RDS in place, it could have been a very different story.

But to be honest, the biggest win for this new solution is about the protection of data. Knowing that nobody can access any client data or sensitive business information, unless they have gone through the remote system, and they can't save it onto any device. That's huge peace of mind, especially for a regulated financial business.

We rate the Riven team very highly. They are very focused and have great attention to detail. They have an incredibly strong understanding of information security, particularly appreciating the nuances of GDPR. They totally get the implications of getting it wrong when it comes to sensitive information. More importantly, they not only understand it, but they can deliver against it too.

I would say to any company considering appointing Riven to look after their IT, just go for it. You certainly won't regret it.”

Tim Harries . Head of Risk, Governance and Compliance

