

# CASE STUDY

## WINGATE FINANCIAL PLANNING



Wingate Financial Planning ([www.wingatefp.com](http://www.wingatefp.com)) is an award-winning firm of Chartered Financial Planners based in Caterham in Surrey that helps individuals to understand and achieve their lifetime financial goals.

The company is growing fast and recently acquired another business. With just 20 employees, the IT systems had always been managed internally. However, **in order to prepare for future growth and also reduce the amount of time spent on IT administration, the company decided to upgrade their IT system and move to WorkPlaceLive's hosted desktop, cloud computing system.**

*"We can work seamlessly from any location as we can access our whole IT suite from anywhere with an internet connection, which is hugely beneficial for our business."*

Ben Clarke  
Managing Director

Ben Clarke, Managing Director of Wingate Financial Planning comments: "We were spending an increasing amount of time managing our IT infrastructure - keeping it up to date and virus free. The system was unreliable and out-of-date and our work was regularly interrupted by IT issues and downtime. **As a growing business, we needed to look for a more effective and robust system.**"

He continues: "We met with several IT companies to ascertain the best solution for our company. Our main goal was not so much about money savings, but more about finding a robust and consistent system that was also cost effective. **After meeting with WorkPlaceLive, it was clear their hosted desktop solution would be perfect for our requirements.**"

Wingate Financial Planning was running Microsoft software, client management software as well as licensed and nonlicensed software all of which needed to be moved into the cloud. This was done efficiently by WorkPlaceLive over a weekend. Very quickly all the systems were seamlessly updated to the cloud and working efficiently. **"Moving to the cloud has taken the stress out of our IT management. We no longer have to worry about anti-virus software updates or that we have the latest software as it is all provided for us and managed by WorkPlaceLive."**



Ben comments, "We can also work seamlessly from any location as we can access our whole IT suite from anywhere with an internet connection, which is hugely beneficial for our business. **We have also experienced less downtime in the last 18 months than ever before.**"

"Working with WorkPlaceLive has been a very positive experience and I would recommend them to similar financial planning companies as well as growing businesses. **We now have the secure, robust, affordable and consistent IT system we need which has revolutionised our business," he concludes.**

