



"We knew outdated technologies and servers were an unacceptable risk for us. Triella was able to help us achieve long-term viability."

—Karen Hudson
COO, Advisor Impact

OFFERING STABILITY VIA A CLOUD-BASED PLATFORM

The Client

Advisor Impact uses a data-driven approach and industry-leading programs, research and tools to help financial services providers drive client engagement and growth.

The Burning Platform

Advisor Impact's thought leadership is based on research from three G8 partners (U.S., Canada, and U.K.). Technology is a critical component of how they source, validate and present their research; outdated servers and operating systems were becoming a concern.

The Business Case

The company was ready for change and ready to find the right provider. Their goals: modernize their technology, reduce the risk of a systems failure, and ensure continuous uptime for their users. They also needed to ensure that everyone on their team had access to documents and tools regardless of location.

Enter Triella

Triella had been providing support to Advisor Impact for five years and the company's management team was impressed with managing principal, Charles Bennett's structured approach. When Charles talked about the need to shore up their technology, the company listened. Karen is succinct: *"Charles was able to present a number of options, including a move to the Cloud and he was able to structure our investment to make it affordable."*

Exceptional Value

Triella delivered exceptional value:

- Presenting multiple options for updating their technologies and then helping Advisor Impact select the right option to support their business needs.
- Organizing an office move including wiring up the new premises and moving the technology in such a way that the firm was back to work right after the move.
- Developing and implementing a plan for moving from an on-premise infrastructure to a Cloud-based infrastructure.
- Consolidating their server platform at Primus Ottawa to the firm's own private Cloud at Triella's Tier II data center.
- Accommodating the company's need for continuous uptime from their web services which are key to serving their customers.
- Disposing of equipment no longer needed as a result of moving to the Cloud.
- Optimizing bandwidth at the new office by selecting a service provider that could deliver consistent and reliable Internet service.
- Providing training to staff on how to access their private and secure Cloud through Citrix remote access technology on PC's, Macs and tablets.
- Providing continuous technology support to the company 24/7.
- Simplifying pricing to a single cost per month for all services including on-site and in-office support.
- Delivering peace of mind via quarterly maintenance and reporting.

Exceptional Results

Karen Hudson: "Once we were up and running on the new system, we knew right away that Triella had delivered what we wanted to achieve: stability, comfort, and security."

For more information about Advisor Impact: www.advisorimpact.com

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Contact Triella at 647.426.1004 or info@triella.com

TRIELLA TECHNOLOGY TRANSFORMATIONS:

We facilitate technology transformations that drive and support business success.

We deliver results through consulting, assessments, services and solutions.

CONSULTING



ASSESSMENTS



SERVICES



SOLUTIONS

