



Microsoft Windows Small Business Server 2003 Customer Solution Case Study

"Windows Small Business Server 2003 saves us time, make us more productive and helps us meet our regulatory obligations."

Mike Miles, Managing Director, Accalon Associates

Accalon Associates

Customer: Accalon Associates Limited

Website: www.accalon.co.uk

Customer Size: 5 employees

Location: Hockliffe, Bedfordshire, UK

Industry: Financial Advisers

Customer Profile

Accalon Associates are independent financial advisers and lifestyle planners.

Software

- Microsoft Small Business Server 2003 Standard Edition
- Microsoft Office 2003
- Microsoft XP Professional
- AVG Antivirus

Hardware

- Dell PowerEdge PE830
- Dell Dimension Desktop

Services

- Supply of all Software & Hardware
- Complete Installation & Troubleshooting
- Management, Maintenance & Support

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Financial Advisors Gain Flexibility & Mobility with New IT Infrastructure.

Accalon Associates provide financial planning for business owners, those approaching or in retirement & those facing challenges to maximise their investment opportunities within clearly defined risk parameters. The financial advisers sometimes need to work from home, from client offices and usually from the main office requiring seamless access to emails, files & applications. They implemented a solution based on a Windows Small Business Server 2003 and a Dell PowerEdge server that helped save time and boost productivity through mobility & flexible working.

Business Needs

A typical individual is too busy doing what they do best thus tending to leave their own financial planning issues on the back burner. This is where Accalon comes in. "It is vital for us to demonstrate and quantify 'added and continuing value' to our clients otherwise why should they make an investment in such a relationship?"

To consistently achieve these objectives for their clients Accalon's financial advisers must process a great deal of data.

"The FSA put great demands on us and we use a number of software

applications to help us."

They run an almost paperless office with documents scanned in, stored & indexed electronically.

Unfortunately, the previous infrastructure did not allow any access to this data remotely, nor did it provide for a simple, regular, frequent and error-free backup.

This meant time wasted on backups and worry that it might go wrong potentially losing years of vital data.

And the ability to access documents, emails, files or client records when not in the office was totally absent.

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Microsoft Windows Small Business Server 2003 R2

- Secure your data easily
- Save time and money
- Work from anywhere
- Improve financial management
- Attract new customers
- Manage your customers better



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time focusing on your business

Microsoft Technology Provider

Flint IT is a Microsoft Small Business
Specialist located in Dunstable, Bedfordshire.
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Phone: 0845 201 1946

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Solution

In August 2006 Accalon enlisted the help of Flint IT, a Microsoft Small Business Specialist that provides network infrastructure implementations. Flint IT deployed a standardised IT infrastructure based on Windows Small Business Server 2003 (SBS 2003) installed on a Dell PowerEdge server. This comprehensive solution includes Microsoft technologies specifically designed to meet the needs of small businesses.

With SBS 2003, employees now have a secure way to access email, shared documents and their electronic library required by the FSA. Users also now have full remote access to their office computers and all files and programs on their computers, even when away from the office.

Benefits

Accalon now has a standardised infrastructure that provides centralised data storage and increased productivity for all users, whether they are working in the office or remotely.

The financial advisers have also saved time and improved communication.

Centralised Data Storage. "Previously, our backup was incomplete, time-consuming and prone to error." Mike Miles commented. "Now we have an organised system of centralised scheduled backup for all our business critical data including, email, files & databases."

Increased Productivity. With the new remote access features of SBS

2003, Accalon employees are more productive. "I may visit a client at their premises." explains Mike Miles, Managing Director, Accalon Associates. "While I am there I may want to demonstrate the analysis tools we use to ensure clients investments are maximised. Having the new SBS 2003 remote access server, I am able to demonstrate those tools as if the client were at my desk. This is a major productivity boost."

Time Savings. "Previously, if I had a client meeting at 10am and additional preparation was required then I had to visit the office beforehand." says Bob Gillett. "Now I can do that preparation from home before I leave and save the time travelling to the office."

Improved Communication. With the new consolidated system, Accalon's financial advisers have improved their overall communication. "We have very busy diaries", says Mike Miles. "The shared calendaring built into Small Business Server is great. Our administrator can set appointments for us in our own calendars when we are not in office. And I can see other's calendars clearly to identify who they are meeting with and schedule team appointments knowing there will not be clash with an important client meeting. Our ability to communicate and collaborate from anywhere at anytime is essential as we are rarely all in the office together. Windows Small Business Server 2003 keeps us connected with each other."

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