

Case Study

OnServe Helps Ontario Financial Firm Stay Ahead of Their Evolving I.T. Needs



O'Farrell Financial, located in Kemptville, ON, provides financial and estate planning services to help clients meet their goals, whether they're planning their estate, purchasing a home, or planning for retirement. O'Farrell Financial was growing at a rapid rate, and it became clear that they needed more than their previous I.T. person's 2-4 hours of support and troubleshooting. Ultimately, it was time to find an I.T. support company to handle their evolving I.T. needs.



O'FARRELL
Financial Services Inc.
KEMPTVILLE BROCKVILLE WINCHESTER

In the financial services industry, firms must leverage reliable and secure information technology to keep track of client information, streamline day-to-day operations, and ultimately, serve their clients effectively.

The Situation: A Growing Financial Services Firm That Needed More Support Than a Part Time I.T. Person Could Offer

Prior to working with OnServe, O'Farrell Financial was working with a part time I.T. person who handled their I.T. operations; however, as their company grew from a small, one office business to a larger business with 3 offices, they knew they needed a higher level of expertise and support.

Graham Pincott, Controller & Partner at O'Farrell Financial, explained, *"When I joined the company four years ago, we had one office, and everyone was running Windows 98, it was something I could manage. In 2013, when we had 2 offices and were expanding to a third office, we were changing all of our hardware and software, and I couldn't quite manage it anymore."*

He continued, *"We had an I.T. person troubleshooting 2-4 hours a month, but we needed more than that. We needed someone to take over our entire I.T. operations and troubleshoot issues, so we turned to OnServe!"*

In addition to their rapidly growing I.T. needs, O'Farrell Financial was having trouble with older equipment, connectivity issues at their remote sites, and a lack of long-term plans/goals for their network.

The Resolution: Proactive Managed I.T. Services to Keep Their Financial Service Firm Productive While Minimizing Disruption & Downtime

After sitting down with the team at OnServe, O'Farrell Financial quickly realized they were making a good choice. As Graham said, *"I sat down a few times with their sales team and one of their I.T. people, they made it clear that they could manage our whole I.T. system remotely and that's what I needed – someone I could turn to when something wasn't working and they'd fix it."*

O'Farrell Financial now benefits from updated equipment and managed I.T. services, including but not limited to:

Unlimited help desk support to address their I.T.-related questions, concerns, and issues in a timely manner.

Data backup to keep their data safeguarded, backed up, and recoverable in the event of a disaster.

A disaster recovery plan to help them continue operations with minimal disruption or downtime, no matter what comes their way.

Plus, O'Farrell Financial is able to focus on their clients, instead of their information systems, as a result of responsive I.T. support to handle issues as they arise. Graham offered some insight, *"I'd definitely recommend them. They have a dedicated rep that's reachable and ready to come onsite to figure out the problem."*

He continued, *"Their support team has greatly improved – they know their clients and what's important and needs to be dealt with right away. Since the relationship between us has evolved, we've seen their knowledge of our needs get stronger!"*



Interested in learning more about our IT services and support? Give us a call at 877-996-6622 or send us an email to info@onserve.ca. OnServe offers the best IT Services for Financial Firms looking to focus on their clients instead of their information systems.