



CASE STUDY:

PRINCIPAL & PROSPER

HIGHLIGHTS

Website

www.principalandprosper.co.uk

Location

Edinburgh

Industry

Financial Advisors

Products Used

- Horizon VoIP
- Microsoft DFS

BACKGROUND

A Scottish based financial advisor and planning company focusing on meeting aspirations and build long lasting relationships with their clients.

THE CHALLENGE

In 2017, Principal and Prosper's previous IT provider was unfortunately unable to keep up with the growth of the business due to their location, despite best efforts.

With IT and communications so key to the smooth operations of their work and the business expanding towards £2 billion under management. The P&P team engaged Netopa and agreed to implement a comprehensive plan to modernise the internet connections, a hosted GDPR compliant phone system and new Server hardware.

THE SOLUTION

Netopa engineers visited all three of the offices of Principal and Prosper in Edinburgh, Glasgow and Kelso to observe the current state of their IT and assess any issues. The engineers found that the entire domain would need to be rebuilt to accommodate the growth and the new build would have to focus on security and stability for the future.

Engineers installed new, warranted Dell equipment with proactive software to prevent problems accumulating in the future as well as encryption for security and GDPR compliance. With installations of new servers in their Glasgow and Edinburgh office.

opa were able to install more secure backups and create the necessary Virtual Private Network (VPN) tunnels for the offices, allowing a data sync in between the offices previously not possible.

THE RESULT

Netopa now support the IT of Principal and Prosper. With installing programs such as Panda Adaptive Defence 360, we are making sure that we stay in close contact assisting with any and all problems both remotely and providing onsite support to all locations.