



## Success Story

### Heritage Financial

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Rebecca Sanders, Project Manager, Heritage Financial

#### THE CHALLENGE

Heritage Financial Services, which employs approximately 16 people, provides comprehensive wealth management via independent, fee based investment services coupled with asset protection as well as tax and estate planning. As the business began transitioning into an independent registered investment adviser and opened a new satellite office, the company realized it needed to partner with an experienced information-technology solution provider.

"Previously, we relied on a network supported by our previous broker-dealer, and we had just one office in Norwood," said Rebecca Sanders, Project Manager for Heritage Financial. "The shift to an independent registered investment adviser and the growth that required us to open a second office in Stoneham meant we needed to expand our technology infrastructure."

With these transitions, Heritage Financial would also need to own and support all of its hardware and software. With the addition of a new office, the company also wanted to deploy technology that would allow employees in both offices to function and service clients efficiently.

"When we first opened the new office, if a client called into the main office, we had to ask them to call the other office or pass a message along," Sanders said. "We wanted to have a phone system where we could automatically receive and transfer calls from both offices as though everyone worked in one office."

#### THE SOLUTION

In looking for a technology partner to help Heritage Financial deploy a new computer network along with telecommunications and connectivity solutions between headquarters and the new office in Stoneham, the first solution provider that Sanders considered was Covisia Solutions.

Her search ended promptly. "We were working with another IT provider at the time but found that they could not deliver what we needed," Sanders said. "Covisia immediately impressed us with their ability to provide a range of technology solutions. Not only do they offer deployment and managed services that can provide a computer network with on-going support, but they also offer specific expertise in two key technologies: Citrix and Cisco telecommunications solutions."

#### Key Benefits: Covisia - Citrix Remote Access and Cisco Unified Communications Deployments

- Allows remote-office employees as well as at-home employees to easily access regular desktop applications.
- Enhances ability to quickly transfer customer phone calls between offices and for employees at multiple offices to communicate easily.
- Provides new computer infrastructure and managed support services that allow the business to own and operate all its applications properly.

One of the technologies that Covisia recommended was Citrix XenApp, which allows employees in remote offices to log-into servers in the main office to access their regular desktop applications—just as though they were in the main office. Employees can also log-into the server from home or the road.

“Citrix offers the fastest and most stable remote-access solution,” Sanders said. “The service is fast, predictable and less expensive than regular PCs connected to the home office via a virtual private network.”

The Cisco CallManager Unified Communications solution that Covisia recommended connects all employees, whether they work in Norwood or Stoneham, into the same phone network. Clients call one number and are immediately connected to their financial advisor. Employees from Norwood can call employees from Stoneham via a simple extension dial. “The Cisco telecommunications solution makes it easier for our staff to function, but most importantly, it allows us to service our customers more efficiently,” Sanders said.

The new servers that Covisia deployed include a Microsoft Exchange Server for e-mail; an application server to handle Heritage Financial’s customer-relationship-management software; a Microsoft SQL Server that runs a portfolio financial reporting application; a server for data backup and recovery; and the Citrix server for remote office and home users.

“The transition to an independent registered investment adviser required us to significantly increase our network infrastructure,” Sanders said. “So it was critical to rely on a technology-savvy company like Covisia.”

## THE BENEFITS

“Covisia gives us all the IT support we need,” Sanders said. “We do not have an internal IT department, so a partner like Covisia is essential to keeping our business functioning on a day-to-day basis.”

Sanders added that Covisia has proven invaluable when it comes to helping formulate strategic technology plans. “Covisia has experience with just about every technology,” Sanders said. “They are experts on mainstream products but also have the ability to research lesser-known products. They effectively interact with other technology vendors to help make sure we deploy effective solutions and run them properly.”

One of the strengths of the approach by Covisia Solutions is their level of customer service. “They are always available to correct any issues,” Sanders said. “Covisia takes the time to understand our business environment so they can properly guide us in finding the right solutions. They provide all the information we need to make educated decisions on technology.”

The ultimate proof of the level of commitment between the two companies came in December 2009 when Heritage Financial decided to extend its managed service contract with Covisia. “The solutions that Covisia deployed were a significant investment to us, but they were solutions we simply had to have to change our business model and help the company grow,” Sanders said. “Covisia delivered value commensurate with that cost, and they are the ideal partner to maintain our technology investment.”

## IN SUMMARY

When Heritage Financial needed to deploy a new computer network infrastructure and expand operations from one office to two, the company turned to Covisia Solutions. Covisia deployed and now provides on-going managed services support for a server architecture that includes Microsoft Exchange and servers for CRM, financial and document-scanning applications as well as a backup and disaster-recovery server. Covisia also deployed Citrix XenApp and Cisco CallManager Unified Communications solutions that allow remote-office and at-home employees to utilize Heritage Financial applications and the phone system just as though they work in the main office.

### Covisia Solutions, Inc.

Covisia Solutions is a full-service IT solutions provider focused on helping organizations align their IT operations with their business to improve information access and security, reduce complexity and cost, and manage technology to meet the needs of competitiveness, growth and change. Whether your need is improved information access or greater security, a network upgrade or strategic planning, Covisia Solutions can help your IT organization deliver for business.

