



Case Study

Genesis Financial Partners
Empowering better service &
supporting flexible work.

Partnered with Atarix, empowering better services & supporting flexible work.

Focused on you.

The Challenge

At the time of exploring new ways of working, the pandemic hit which accelerated this initiative coupled with the end of their office lease, putting extra pressure on making key decisions with large impacts.

Genesis Financial Partners relied on legacy, on-premise IT services which proved to limit their agility in getting work done whilst outside the office. The team was left spending their time trying to deal with legacy remote access issues whilst still trying to provide the level of service they pride themselves on.

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I was regularly dealing with IT issues myself and it took time away from our core business. Since deciding to use Atarix, our systems have been completely upgraded and enables us to overcome much of our legacy remote access challenges. With Atarix's support and guidance, we can now be more agile, responsive and available for our clients.

Wilton Wong, Partner

Moving away from the organisation's traditional on-premise IT to a cloud-based solution, Genesis Financial Partners have now empowered their team with the tools to deliver better services whilst supporting flexible working.

The Solution

With the amount of change happening within Genesis Financial Partners alongside the changes in the world, IT Strategy was an important place to start to ensure the success of the transformation as well as mitigate as much risk and disruption to the business as possible.

Maintaining their ability to provide the best customer service was at the forefront of our partnership, which was a guiding star for success. This meant their communication and collaboration for remote work had to be on point so that their clients wouldn't be affected.

We transformed the overall IT, using Microsoft technologies with no disruption to their clients whilst the business made the impactful decision to no longer have a physical office at all.

Modern Workplace

Our Collaboration and Productivity Solution - delivered on the Microsoft 365 platform provides Genesis Financial Partners with the latest tools in cloud technology to get their work done and collaborate as a company.

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Security

The security of our customer's data is always key. Genesis have been set up with Atarix Security Baseline, across their solutions. Genesis devices are also fully managed to ensure their staff are only accessing company data from maintained and trusted devices.

Unified Communications

With Microsoft Teams Calling, the team now has a Collaboration and Communications tool, providing them with a virtual telephony system where they're able to make and receive calls as well as transfer calls to team members, much like they would in a physical office.

Managed Services

Managed Services are our bread and butter, providing ongoing support and guidance for Genesis Financial Partners for these above areas, ensuring they are achieving the most out of their technology to help meet their business goals.

The Value

Physical Office? A thing of the past.

Having the right strategy, technology and tools in place has allowed the business to make progressive decisions in a new era of modern work.

Genesis Financial Partners' business model is very much centred around looking after their clients in their lives, and now, they've taken it to the next level and elevated it to their own people, with the freedom to live the way they want.

Having chosen us as their IT partner, Genesis now has a long-term IT strategy aligned to their business goals with our Virtual CIO and Customer Success team.

And if any of their staff encounter any issues in their day to day, our Support team are there happy to help.

Productive & Happy Staff

Remote and Flexible. No time wasted on commuting provides staff the ability to be productive from anywhere they need to be.

Flexible Remote Work

Happy customer with improved ability to respond to customers using Modern tools, collaborating across the business.

Long-term Strategic IT

Consultative direction and approach from a Virtual CIO and enabling IT strategy for the long term.

Peace of Mind

A better night's sleep knowing their data is secured, backed up but ready and at their fingertips with secure data and devices.