

Case Study: West Paces Advisors



WEST PACES ADVISORS

Generational Wealth Management

A Smooth Setup for a Brand New Start-Up

SITUATION

When John Oglesby and his partners decided to form their own financial advisory group, they wanted to make wise decisions right from the start. They intended to build a top-notch wealth management and investment advisory firm, and they knew setting up secure, reliable technology systems was one of their critical tasks as they pursued their goal. Since technology isn't their focus, they turned to Network 1 Consulting for expert help. John was pleased with Network 1's initial approach, saying, "They got to know me and our business plan, then came back with a recommendation for what we would need to help meet our goals." Once the goals and needs were communicated, Network 1 went to work on a plan to set up John's brand new firm for a smooth transition to a fully secure cloud environment.

SOLUTION

Knowing how much there is to think about with a new business, Network 1 set out to take all technology worries off the partners' plate and seamlessly set them up so they could hit the ground running. John explains, "We started our firm on June 1 and they helped us in planning for the six months prior, so that everything was in place the moment our doors opened." Network 1's professionals provided advice and project management, with the company acting as the quarterback to handle all the necessary technology components and vendors associated with getting the business set up properly. The plan went without a hitch, and John reports, "Installation and planning was smooth. We were very satisfied." He was even comfortable during a relationship transition: "When they first started working with us, we had a designated professional who was assigned to help us. Not long ago, he ended up moving to another company; he had a good opportunity and Network 1 was happy for him, but we worried. He understood our systems backwards and forwards. Network 1 got out in front of the changes and we met our new guy before the other even left, so that he could pass the baton with no hiccups. It was a perfect transition, and that's what you want to see."

RESULT

West Paces Advisors started off on the right foot just as they had hoped, and Network 1 has been their trusted outsourced IT department ever since. The start-up hasn't run into any major difficulties, and their cloud solutions are working just as they should. Most importantly, when questions or minor issues do arise, they know Network 1 is there to help. "We couldn't be more pleased," says John. "We didn't want to be experts in tech; we want to be experts in our own profession, so they handle the tech. They are in sync with us and they are there for us. Whenever there's a hiccup, they fix it. We want to think about other things so they think about the IT things. We highly recommend them."

Network 1 Consulting, Inc.

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