

# 2plan

### Client

2plan Ltd provides advice, compliance and technology services to self-employed independent financial advisers (IFAs) nationwide, supported by one of the UK's largest insurance companies, Standard Life.

### Challenge

2plan needed to ensure its IT systems kept pace with phenomenal growth and supported the business seamlessly, enabling employees to focus on strategy and development.

### Solution

Full IT infrastructure hosting and management services from ICM using virtualisation technologies. A dual-centre failover, data replication and thin-client environment supports business continuity, while built-in scalability enables capacity upgrades in line with business growth.

### Benefits

An end-to-end service from a single proven supplier that delivers cost savings, improved system availability and reliability, easy and cost effective scalability, faster software deployment with minimised risk, and the ability to focus on improving business process efficiency.

## End-to-End IT Enables Rapid Business Growth at IFA Service Provider, 2Plan

With a business strategy based on rapid growth, 2plan had to ensure its business-critical IT systems kept pace with demand and enhanced performance.

2plan had a clear vision. *"We aimed to scale up to 1,000 advisers across the country,"* says Mark Smith, IT Director. *"We were able to map out our business and the associated technology to support our growth for the next 10 years."* The business is heavily reliant on IT. Each adviser has a tablet PC with all the software required to do their job: their virtual office. Smith continues: *"IT was at the forefront of our plan. We wanted to get IT right up front to future-proof the business. However, we recognised that managing IT infrastructure is not our speciality. That's why we chose to outsource our entire IT infrastructure management and hosting to the experts."*

ICM delivered a full service based on VMware virtualisation and Microsoft technology. This is hosted in two ICM data centres: a primary site that features a Storage Area Network (SAN) and servers with the capacity to scale up to 1,000 advisers, in line with the business plan, and a virtualised set-up at a secondary failover centre to maintain business continuity. ICM replicates all data across both sites and has invested in high quality network connections between the centres to optimise service levels. Should 2plan's offices become inoperable, the thin-client Citrix environment allows staff to access the company's systems via the Internet from any location.



*"The technology lets you quickly add a virtual machine, drastically reducing the time taken to provision a new server and avoiding the cost of buying additional machines. In the past, an e-mail migration to a new server to get 1,000 users running could have meant a week's work. With a virtualised solution this can be achieved in an hour – or even less"*

**Mark Smith** IT Director 2Plan Ltd

Smith says outsourcing has enabled 2plan *"to reduce the need for at least seven in-house IT support staff, a data centre and all the technology that comes with it. This represents a substantial cost saving."*

The virtualised solution provides an easy path to add servers and capacity in the future, without the need for wholesale reconfigurations or installations.

Managed Hosting & Cloud Services

Business Continuity & Disaster Recovery

Managed IT Services

Networking & Unified Communications

Professional Services

Product Supply



# 2plan

## Investing in the future

ICM has full responsibility for the entire infrastructure: hosting, monitoring and management. *“Our infrastructure is more than mission critical: it’s almost life critical,”* Smith says. *“ICM fully understands this. We have complete confidence in their capabilities, knowledge and experience.”*

*“At 2plan, we know where our skills lie. ICM is the expert in the infrastructure layer, taking full infrastructure management and support off our hands. This leaves us free to design and build our business process - from initial client meeting through to electronic remuneration of IFAs - to be as slick and efficient as it possibly can be. This union of strengths is what makes the ICM-2plan partnership such a good fit.”*

*“We are investing in IT to ensure we have the capability to run our business successfully today and in 10 years,”* says Smith. *“The fully managed service from ICM represents our investment in the future. The built-in scalability of our infrastructure means we are positioned to grow for some considerable time. We are already saving the salaries of seven staff, plus all the ongoing running costs that come with keeping IT management in-house. This is all covered within ICM’s existing capability. And, as we scale our number of advisers, the system will really come into its own.”*

*“With 1,000 advisers in the field, we would typically need 400-800 internal support staff. 2plan has created an advanced business model supported by IT that will enable us to achieve the same level of scalability with as few as 65 support staff. The ICM infrastructure is designed to support this model for the foreseeable future.”*



## More Information

If you would be interested in learning more about ICM and how we could support your business, please contact us.

- Call 0844 863 3000
- [enquiries@icm.co.uk](mailto:enquiries@icm.co.uk)
- [icm.co.uk](http://icm.co.uk)



*“Managing IT infrastructure is not our speciality. That’s why we chose to outsource to the experts. We have been able to reduce the need for at least seven in-house IT staff, data centre and all the technology that comes with it. This represents a substantial cost saving”*

**Mark Smith** IT Director 2Plan Ltd

## About 2plan

Backed by Standard Life, 2plan soon established itself as one of the UK’s leading independent financial advice firms. Using market-leading technology to support advisers and their clients, 2plan provides a wide range of wealth management, retirement, investment and financial planning services.

## About ICM

We take a business-led approach to align your business needs to the right IT solution, enabling you to drive innovation and improve service, at a lower cost and with reduced risk to operations. You can choose from individual services or a complete approach: Managed Hosting & Cloud Services; Business Continuity & Disaster Recovery; Managed IT Services; Networking & Unified Communications; Professional Services; and Product Supply. Whatever challenge you need to overcome, ICM makes it possible.

