

## Elevating Financial Advisory Services: Godfrey Pembroke's IT Revolution with Technology in Depth

### Executive Summary

In a strategic move to enhance its IT infrastructure, Godfrey Pembroke, a prestigious financial advisory firm, partnered with Technology in Depth. Founded in 1981, Godfrey Pembroke has a longstanding tradition of delivering tailored financial advice across Australia. Facing the need to modernize its IT environment to support seamless communication, robust cybersecurity, and flexible remote work capabilities, Godfrey Pembroke turned to Technology in Depth. This case study explores the transformative journey from a traditional IT setup to a cutting-edge, secure, and highly collaborative digital workspace, all within the constraints of a tight timeline and budget.

### Client Overview

Godfrey Pembroke, renowned for its high-quality financial advice and deep expertise in managing complex financial needs, has been at the forefront of the industry since 1981. With a network of over 100 advisers and 26 practices nationwide, the organisation prides itself on its transparency, professionalism, and trusted relationships within the financial advisory sector.

### Challenges and Objectives:

Godfrey Pembroke sought to overhaul its IT infrastructure to ensure continuous, clear communication among its businesses and financial advisors, facilitate secure and flexible remote work, and enhance cybersecurity measures to protect client data. Additionally, the firm aimed to upgrade its Customer Relationship Management (CRM) and marketing infrastructure to streamline client communications and data management.

*"The collaboration with Technology in Depth was nothing short of revolutionary for our firm. Their expertise and dedication to our project delivered a seamless transition to a modern IT infrastructure, enabling us to continue providing exceptional service to our clients without missing a beat. Their work ethic and project management were instrumental in achieving this transformation within our desired timeframe and budget."*

- Mark Fisher,

CEO of Godfrey Pembroke



### Solutions Provided:

Technology in Depth designed a comprehensive IT solution encompassing:

- **Microsoft 365 Cloud Integration:** Leveraging Microsoft Teams for communication, SharePoint for collaboration, and enhanced security features for cybersecurity resilience.
- **HubSpot CRM Implementation:** For superior customer relationship management and marketing capabilities.
- **Secure Operations Centre Integration:** Providing 24/7 monitoring for unparalleled system security and data protection.
- **Project Management Excellence:** Utilising Prince2 methodologies for seamless transition and implementation within budget and timelines.

### Implementation Process:

The implementation was meticulously planned and executed, adhering to ISO27001 standards for information security. Technology in Depth's project management team ensured a smooth transition to the new IT environment, coordinating closely with Godfrey Pembroke to address challenges promptly and efficiently.

### Results Achieved:

The partnership resulted in a state-of-the-art IT environment that supports Godfrey Pembroke's vision of delivering tailored financial advice through enhanced communication, robust cybersecurity, and flexible, secure remote work capabilities. This transformation has empowered the firm to maintain its leadership and innovation in financial advisory services.

### Lessons Learned and Conclusion:

This project highlighted the importance of strategic planning, clear communication, and robust project management in achieving a successful IT transformation. Godfrey Pembroke's forward-thinking approach and Technology in Depth's expertise have set a new standard for IT infrastructure in the financial advisory sector.

### Call to Action:

For financial advisory firms looking to elevate their IT capabilities and secure their client communications, Technology in Depth offers the expertise and experience to drive your digital transformation. Contact us today to learn how we can support your IT needs and help you achieve a competitive edge in the financial services industry.



**GODFREY PEMBROKE**

Financial Advice Specialists