



KILLIK & Co

Overview

Industry

Financial services

Highlights

- Reduced database administration overhead.
- Simpler process to configure changes and test updates in Dynamics 365 following cloud migration.
- Management of IT and property assets within a single application.
- Improved handling of processes by transitioning spreadsheets to Dynamics 365.
- Easier access to shared documents.

Killik & Co is an independently owned wealth manager, that has been advising clients on savings, planning and investing for over 30 years.

Following the migration of its Microsoft Dynamics 365 system to the cloud with Preact's support, we spoke to Dan Young (Head of IT & Support) at Killik & Co to discuss the outcomes the business has subsequently seen.

What type of processes does Killik & Co manage in Dynamics?

We originally used Dynamics as our IT asset management database which was an on-premise system built by a third party. This stored IT assets and included details of associated purchase orders and invoices. As we moved Dynamics to the cloud, we expanded this to also cover our property management which includes details of leases and insurance across these sites.

What benefits have you gained by moving to the cloud?

Deploying Dynamics 365 Online has freed up our internal resources as we no longer have the overhead of maintaining this database on our server. It's removed a series of maintenance headaches, such as handling security and software updates, which means we can better focus our time elsewhere.

By moving to the cloud, we now have a sandbox environment to thoroughly test changes before these are applied to our live site. For minor changes that we complete, the process is far easier with our data in the cloud as we no longer need to be in the office or connect to our network.

With Dynamics 365 in the cloud, we also have earlier access to new features, if these are even released for the on-premise edition. Once we completed our upgrade, we immediately saw value from the modernised layout and within our teams, the feedback and sentiment has been positive with people more inclined to use the system.

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I felt their team asked the right questions and
the entire process ran very smoothly"*

Dan Young
Head of IT & Support
Killik & Co

Another benefit we've seen is the integration between SharePoint Online and Dynamics 365 Online. Previously, we stored our documents in Dynamics, but as we've connected our live system with SharePoint it's now easier for our team to view property information, POs and other documents, without needing to go into Dynamics every time.

How did Preact handle your Dynamics upgrade and cloud migration?

Preact were fantastic throughout our project. We had a very clear scoping session at the start, where we laid out requirements, and I felt their team asked the right questions which helped us map our fields and processes to the new version. We were assigned a project manager who kept us updated and the entire process ran very smoothly.

How is Dynamics 365 meeting your expectations?

Dynamics is doing what we need it to and it's helping our teams work more efficiently, so that we can provide better service to the overall business.

For our IT and property management functions, this is vitally important as it keeps track of our assets and reduces administration. For property management, we previously worked through spreadsheets and paper files, so Dynamics has allowed us to quickly streamline these processes.

How is Preact supporting Killik & Co?

Since we upgraded, it's easier to get changes done and these are mostly handled through Preact.

We haven't needed to employ a dedicated resource exclusively for Dynamics as we have support with Preact. I've found their service very good and there are no complaints at all. Their portal allows us to raise tickets, and we know these cases will be resolved in a timely manner without us needing to chase.

Their managed service has been easy to use, and their team have been responsive whenever we've needed advice.

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What are you planning next?

We are looking to make greater use of the dashboards in Dynamics 365 to see a snapshot of our asset warranties and when these expire on individual pieces of kit. For our property management, we'll be developing reports that will help us keep track of the expiry for these leases and utilities.

Looking further ahead, we are considering bringing more processes into Dynamics which may include the management of contracts handled by our compliance team.

We're grateful to Dan for sharing his feedback and we look forward to continuing to support Killik and Co in realising greater value from Dynamics 365 Online. For details of the investment management services provided by Killik & Co, visit www.killik.com.

How can we help your business?

If your organisation is currently using an on-premise edition of Microsoft Dynamics, contact Preact to learn more about the benefits of Dynamics 365 Online and how we will support your organisation's transition to the cloud.

www.preact.co.uk