

Financial services company reduces costs and increases benefits with licensing agreement

Smith & Williamson

industry:

Financial Services

country:

United Kingdom

business challenge:

Gaining the maximum benefit from a Microsoft Enterprise Agreement for Volume Licensing

solution:

Providing valuable strategic consultancy as a Microsoft Certified Gold Partner

services:

- Software Licensing Agreement assessment
- Planning services for Microsoft Solutions

results:

- Access to improved software support and training, in addition to saving at least £1 million in licensing costs alone over the next three years
- A strategic plan for the future will further save administration time as the company gains more value from its licensing expenditure

Executive Summary

Smith & Williamson relies on an IT infrastructure based on Microsoft technologies. For the past 3 years, the company obtained software through a Microsoft Enterprise Agreement for Volume Licensing, significantly cutting the cost of acquisition. However, it wasn't taking full advantage of its agreement until Microsoft Gold Certified Partner Dimension Data guided administrators through the programme, **further reducing the company's costs and increasing benefits.**

Client Overview

Smith & Williamson, founded in 1881, is the ninth-largest firm of accountants in the United Kingdom (U.K.). Its investment management business has around £9.9 billion funds under management and advice, as of 30 April 2010. Clients vary from private individuals to large businesses, professional practices, and non-profit organisations. With 10 offices in the U.K. and Ireland—including its head office in London's financial centre, the City of London - Smith & Williamson is part of Nexia, a leading worldwide network of independent accounting and consulting firms.

Business Challenge

As a long-term Microsoft customer, Smith & Williamson subscribed to a Microsoft Enterprise Agreement for Volume Licensing and used it to acquire much of the software on which its IT infrastructure is based. When the licensing agreement

was nearing expiration, **Richard Taylor-Holland, Associate Director at Smith & Williamson**, looked at how the company had upgraded its technology over the last few years.

"We needed to ask ourselves: 'Do we need to renew? What value will we get out of it? What value will it add to Smith & Williamson?'" he says.

During a routine meeting with the company's dedicated Microsoft Account Manager, Taylor-Holland mentioned that the licensing agreement was coming up for renewal, and he wanted to ensure that Smith & Williamson was getting full benefit from it. Microsoft recommended that he consult Microsoft Gold Certified Partner and large account reseller Dimension Data.

Solution Provided

Taylor-Holland met with Dimension Data to discuss the licensing agreement.

"Microsoft was releasing new versions of its technologies, so we were trying to understand how we could get onto the next wave of technology. We needed a strategic approach," he says.

Dimension Data has access to new products from Microsoft, early adopter programmes, and technical support. By combining Microsoft technologies with its own consulting and integration skills, it offers a full range of IT solutions.

"We realised early in the discussion that working with Dimension Data would give us a real advantage. In addition to selling the licences to us, the company has the expertise to implement and optimise the software we need," says Taylor-Holland.

“The range of technical consultancy, early adopter programmes, and software provided by Microsoft **allows us to manage and support our Microsoft infrastructure more effectively.**”

Richard Taylor-Holland, Associate Director, Smith & Williamson

Brett Galbraith, Senior Account Manager at Dimension Data, says:

“We conducted a review to find ways to help Smith & Williamson manage its IT environment more efficiently. Based on the Microsoft Optimisation Model, we highlighted strengths and weakness against industry best practice, and then categorised those areas by importance so Smith & Williamson knew which needed to be addressed in the short, medium, and long term.”

The service provided by Dimension Data was included in the Microsoft Enterprise Agreement for Volume Licensing.

“We received the valuable strategic support we needed at no additional cost. It came as part of our licensing agreement,” says Taylor-Holland.

Clive Pugh, Practice Manager, UK Licensing and Software Services at Dimension Data, says: “Smith & Williamson is a great example of how clients that use Microsoft are continuing to turn away from traditional transactional resellers to work with full service, large account resellers to guide them through software licensing, and deploy the technology. This helps ensure clients receive the full benefits of their agreements.”

Business Benefits

By subscribing to the Microsoft Enterprise Agreement for Volume Licensing, Smith & Williamson has access to improved software support and training, in addition to saving at least £1 million in licensing costs alone over the next three years. Setting up a strategic plan for the future will further save administration time as the company gains more value from its licensing expenditure.

- Upgrades to Microsoft Office 2003 Editions save £50,000.
“Fulfilling our immediate needs and upgrading Office 2003 Editions at our Bristol office alone would have cost £50, 000,” says Taylor- Holland. “With Software Assurance, which is part of Microsoft Enterprise Agreement for Volume Licensing, all upgrades to existing software come free of charge.”
- Additional company-wide upgrades save £1 million. During the next three years, Smith & Williamson will be upgrading to Microsoft Office 2010, Windows 7, and Microsoft Exchange Server 2010 across all locations.
“If our licensing contract lapsed, we estimate that it would cost at least £978,000. That was a good enough reason to renew,” says Taylor-Holland.
- Existing software is supported. Much of the financial services third-party software at Smith & Williamson runs on Windows XP. By including the Windows operating system in the Enterprise Agreement, Smith & Williamson can run previous versions of the software regardless of how many times the operating system is upgraded.
Taylor- Holland says: “Without the licensing agreement, the operating system we use on a daily basis would not be supported.”
- Training improves skills and morale. In addition to helping employees do their jobs better, the training included in the licensing agreement improves staff satisfaction. “We’re getting value for money,” says Taylor-Holland, who plans to make use of the agreement’s employee purchase and home use programme, and e-learning for end users.

- Free technical support adds value.
“The range of technical consultancy, early adopter programmes, and software provided by Microsoft allows us to manage and support our Microsoft infrastructure more effectively,” says Taylor-Holland.