

CONSULO



Consulo Financial Planning

www.consulofp.co.uk

Location:

Wakefield, West Yorkshire

Industry:

Finance

Solution:

SharePoint migration

Key technologies:

- Microsoft 365
- SharePoint
- Teams
- OneDrive

Additional services provided:

- Managed IT support
- 3CX hosted telephone system
- BT Sogea broadband



Migration to SharePoint for financial planning company

Consulo Financial Planning embrace the cloud for future-proof, secure modern working

About Consulo

Consulo Financial planning, based in Wakefield, take a different approach to financial services, rolling back the years with old fashioned face to face financial planning. They offer a full holistic planning service and financial protection advice to both personal and corporate customers; from life insurance to shareholder protection.

The challenge

Consulo Financial Planning were relying on an ageing NAS server as part of their infrastructure, which was used to store several terabytes of data. With the hardware approaching end-of-life, reliability was a growing concern. While the NAS was not used to store client data or sensitive information, any potential loss would have a negative effect on business operations.

Accessing files remotely was difficult, limiting collaboration and flexibility and making hybrid working largely impossible. Although paying for Microsoft 365 licenses, many of the included features, like SharePoint storage, were not being fully utilised.

When the business partnered with Primary Technology for Managed IT Support and a new phone system, it became clear that migrating fully to SharePoint and embracing the cloud would be a smarter long-term solution with greater benefits, compared to replacing the outdated NAS. This approach offered better security, modern collaboration tools, and far greater value from their existing Microsoft 365 investment.

The solution

To modernise Consulo's IT infrastructure and embrace a more flexible, secure way of working, Primary Technology led a carefully planned migration to SharePoint and OneDrive, to store corporate and user data respectively. SharePoint was the natural choice for centralised file storage,

Key outcomes

Eliminated reliability concerns around end-of-life hardware by migrating to a modern, cloud-based setup

Gained peace of mind with comprehensive Microsoft 365 backups and improved data security

Enabled staff to securely access files from any device, in any location, supporting flexible working

Created a collaborative digital environment where teamwork and file sharing are easier than ever

Maximised return on their Microsoft 365 investment by making better use of existing tools

Unlocked additional features and capabilities within Microsoft 365 to support future growth and efficiency



"We are delighted to have partnered with Primary Technology whose professional and proactive approach contrasted significantly with our previous supplier. They have made significant advancements to our IT infrastructure and have been very supportive through the changes."

Rob Otter
Director, Consulo Financial Planning

We take a different approach to financial planning.

given that organisation was already using Microsoft 365, allowing us to maximise their investment while reducing reliance on ageing hardware.

The migration, using the SharePoint Migration tool, included full data discovery, to audit the existing file permissions and structure, and the opportunity was taken to streamline and re-organise files, folders and permissions, for easier and secure access post-migration. Once the data migration was complete and all users had confirmed access, the new SharePoint site was synced on to all of the companies' devices. Each employee was also set up with their own OneDrive, making use of previously unused storage allocations for personal files.

The migration was completed out of office hours, resulting in minimal disruption and no downtime, access to the migrated data was seamless with minimal snagging and saw employees experiencing immediate benefits from the streamlined, secure setup. A new Ubiquiti network switch was also installed to help modernise the infrastructure.

Hornetsecurity Total Backup was chosen for backups to protect not just SharePoint data, but the full Microsoft 365 suite, including emails, calendars, files and more. A tenant audit ensured their environment was secure, using multi-factor authentication (MFA), and aligned with best practices. The Microsoft 365 tenant is fully managed by Primary Technology, with defined processes, meaning password resets and other administrative tasks are taken care of remotely, without the need for an on-site visit.

The outcome

The migration to SharePoint has addressed the main concern of reliability worries due to ageing hardware, as well as delivering significant benefits; transforming the way staff access data, share files, and collaborate on projects. With centrally stored files now accessible from any device and location, employees can work more flexibly and efficiently, without compromising security.

This move has also enabled the organisation to fully leverage the capabilities of Microsoft 365, unlocking value from their existing investment by using tools that were previously under-utilised. Additional features such as Scan to email were enabled, using an automatic workflow to read any emails from the scanner and add the attachment to a designated SharePoint folder, using automation to save administrative time.

Confidence in data security and backups has also been vastly improved. With full Microsoft 365 backups in place, including emails, calendars, and files, the team knows their data is protected and recoverable. SharePoint's version control and granular permissions provide enhanced control over document management, ensuring only the right people have access to the right information.

Ultimately, the organisation now benefits from a modern, secure, and collaborative digital workspace that supports their long-term growth, reduces risk, and improves productivity.