

# Case Study: VELA Wealth

## Company Profile

VELA Wealth is a boutique life and wealth planning firm dedicated to crafting innovative strategies driven by their clients' vision of success. VELA is a premium wealth planning firm serving high-net-worth families across Canada. Dedicated to consistently delivering thoughtful, best-in-class solutions for their clients, VELA's culture is shaped by transparency, quality and continuous-improvement.

## The Challenge

In late 2018, VELA was about to move into a new office and recognized that they needed a phone system that provided greater integration with their Office 365 environment. They also wanted to ensure they had the proper security controls in place for their growing business. By 2020, VELA realized they needed to take a more proactive approach to their IT services and needed a company that could deliver.

## The Solution

Dyrand's recommended solution to their phone concerns was to migrate VELA to Microsoft's phone system, providing them with call control and PBX capabilities in the cloud. VELA staff now enjoy the features and convenience of Microsoft Teams, even from their mobile devices. Most recently, Dyrand has onboarded VELA to their Managed Services platform, implementing tighter security controls such as multi-factor authentication and advanced threat protection, and providing the kind of 24/7/365 oversight that enables VELA's management and staff to know that their technology is in good hands.

## The Results

VELA's phone system is now tightly integrated with their other tools and is available from anywhere. And with Dyrand managing all aspects of their IT, they now enjoy the benefits of a more proactive approach to their systems: problem prevention rather than problem management. VELA is now able to conduct their business without the worries of a self-managed technology infrastructure.



- OFFICE 365 EXPERTS
- CLOUD SERVICES
- BUSINESS CONTINUITY
- COMPLIANCE
- SECURITY SOLUTIONS
- COMPLETE IT SERVICES



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