

CASE STUDY

Wealth & Business Advisory Firm | Custom IT Systems That Improve Efficiency and Security

Struggling with inefficient systems and reactive IT support, this advisory firm needed a more strategic approach. Orbis Solutions designed custom systems, improved responsiveness, and strengthened security—delivering the functionality and reliability they had been missing.



CLIENT: Wealth & Business Advisory Firm

INDUSTRY: Financial services / wealth & business advisory

ABOUT THE ORGANIZATION

This wealth and business advisory firm provides strategic guidance to clients who rely on secure, efficient, and well-structured systems. With complex operational needs and sensitive data, technology plays a critical role in delivering consistent, high-quality service.

THE CHALLENGE

The firm had long been searching for IT solutions that could truly align with their unique workflows and operational demands. Off-the-shelf systems failed to deliver the level of functionality and efficiency they needed.

At the same time, slow response times and reactive support created disruptions, while concerns around data security and system reliability continued to grow. They needed more than basic support—they needed systems built around their business and a partner who could stay ahead of potential issues.

THE ORBIS SOLUTIONS APPROACH

Orbis Solutions took a tailored, proactive approach—focusing on how the firm operates and what it needs to perform at a higher level. We:

- Designed and implemented systems aligned with their specific workflows
- Delivered fast, responsive support for both routine and unexpected issues
- Proactively identified and addressed risks before they escalated
- Strengthened cybersecurity with advanced protections and continuous monitoring
- Ensured systems remained reliable, efficient, and secure at all times

Instead of adapting the business to fit technology, we built technology around the business.

THE RESULT

With Orbis Solutions delivering tailored systems and proactive support, the firm now has:

- Technology aligned with their workflows, improving efficiency and day-to-day functionality
- Faster response times that reduce downtime and prevent disruptions
- Proactive issue management that minimizes risk before it impacts operations
- Stronger data protection through advanced security measures and monitoring
- Greater confidence in their systems, knowing they are reliable and secure

WHAT THE CLIENT SAYS

“Orbis Solutions has revolutionized our approach to IT services with their unparalleled ability to custom tailor systems specifically for our unique needs.”

— Donna, Wealth & Business Advisory

