

# The SS&C Advent Services team has never let us down.”

Hoa Le, Managing Director, Operations and Technology, Williams Jones Investment Management

## Williams Jones partners with SS&C Advent Services for smooth upgrades

Migrating to a new core technology platform is no simple matter. Upgrading to a newer version can be challenging, too. With SS&C Advent solutions, most clients find that it pays to engage the Services team to ensure a timely and smooth transition. After all, these are the people who know SS&C Advent products the best. They follow a proven project management methodology resulting in hundreds of successful installations and upgrades. Clients can be confident the system will work properly right from the start and immediately begin to take advantage of the new functionality.

Hoa Le, Managing Director, Operations and Technology at Williams Jones Investment Management, sums it up simply: “Advent Services are amazing. Of the vendors we work with, Advent has the most dedicated and knowledgeable staff overall. It’s a very complex business we’re in, and the services team has never let us down.”

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## Teamwork works

Hoa, a former software consultant himself, provides an example of how SS&C Advent Services augments Williams Jones’ internal capabilities. The firm had implemented Advent Portfolio Exchange (APX) and Moxy prior to his arrival, and was looking to upgrade both systems when he joined the firm. “We were going through the 2008–09 downturn,” he explains. “I knew it was a complex undertaking, but our budget was very tight, and I thought it would save us money to perform the upgrade ourselves.”

Williams Jones went so far as to run a test conversion and map over many services and connections in the test environment. “We had the technical ability to do it, but there was just so much complexity shifting from one version to the next in our environment,” Hoa recalls. “Advent has very good documentation and great support, but we could not rely on that alone for a major version upgrade. It really takes specific knowledge of our environment and our dataset.”

### Profile

**Client:** Williams Jones Investment Management

**Location:** New York, NY

**Description:** Investment Advisor serving private and institutional clients

**AUM:** \$6 billion

### Background

- Firm implemented Advent Portfolio Exchange® (APX) and Moxy®
- In-house upgrade proved to be a drain on time
- Firm prefers to operate on current release

### Solution

- SS&C Advent Services for version upgrades

### Benefits

- Faster and smoother transition following Advent’s proven project management methodology
- Low risk of errors and unexpected obstacles
- Minimal disruption to business
- High probability of success at go-live
- Fast adoption of system enhancements

Hoa concluded their employee time would be better spent overseeing a project at a high level rather than on the phone with the support team working through issues. "When something is mission-critical, we need to coordinate with SS&C Advent Services to help us and not be shortsighted on the cost," he says. "The Advent Services team brings a valuable perspective from working with similar clients. We look at our Advent solution upgrade from the informed perspective of our environment and what we need. When we put those two perspectives together, we definitely end up with the best result. It's a significant enhancement having Advent Services on the project and helping us with an upgrade."

### Streamlined upgrade process

In the years since that experience, SS&C Advent has moved from long-duration, large-scale product releases to a more agile process of frequent upgrades with fewer enhancements at regular intervals. "Advent has improved tremendously as far as the ease of conversion," Hoa notes. "As you go through the whole software cycle from the earliest version to the latest, Advent has made the product much better and the upgrade process much smoother."

Hoa's experience at Williams Jones is instructive for any firm facing a system implementation or upgrade. "We utilize SS&C Advent Services as a software partner and we are very happy with the results," he says. "We wouldn't consider upgrading our Advent solution without them."

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