



## CLIENT CASE STUDY: THE ROYAL COMPANY OF MERCHANTS OF THE CITY OF EDINBURGH



The Royal Company of Merchants of The City of Edinburgh is a historic livery company established under an act of parliament. They manage 17 entities and handle a large amount of data. They approached Lugo through recommendations from accountants and other IT providers to improve their IT infrastructure.

### OBJECTIVE

The main goal was to conduct an IT Gap Analysis to identify areas needing improvement and enhance the overall IT setup. This analysis aimed to uncover both known and unknown issues, providing a clear overview of the company's IT situation.

### CHALLENGES

The company faced several IT challenges, some known and others unidentified. The complexity of their operations, with team members having unique and non-traditional roles, added to the challenge. Additionally, the organisation needed clear communication in non-technical terms to ensure all team members understood the project goals and outcomes.

### SOLUTIONS

Lugo carried out a thorough IT Gap Analysis, capturing all problems and potential solutions in one comprehensive report. They spent time understanding the unique needs of the company and each team member's role. This personalised approach ensured that the solutions were tailored to the specific requirements of the organisation.

### RESULTS

- Successful Gap Analysis:** The analysis was highly successful, identifying both known and unknown issues. The comprehensive report provided a clear roadmap for addressing these problems.
- Clear Communication:** Project goals were communicated clearly and in simple terms, aligning with the company's expectations. This helped in explaining the project to the team and ensuring everyone was on the same page.

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## RESULTS CONTINUED

·**Tailored Solutions:** The recommendations were well-received, offering actionable solutions for the identified problems. Having all problems and solutions documented in one place was particularly beneficial.

·**Smooth Onboarding:** The onboarding process was smooth, with minimal downtime. The team found the new systems easy to use, and the help desk support was efficient and effective.

## CLIENT FEEDBACK

Susan Groat praised Lugo for their professionalism, patience, and clear communication. She emphasised the importance of the Gap Analysis in providing value for money and recommended Lugo services to other businesses. The personalised approach and thorough understanding of the company's unique needs were particularly appreciated.

## CONCLUSION

Lugo's tailored approach and thorough understanding of the client's unique needs led to a successful IT Gap Analysis and smooth onboarding process. The comprehensive analysis and clear communication significantly improved the company's IT infrastructure, providing a solid foundation for future growth.

## ADDITIONAL INSIGHTS

**Training and Support:** The training provided by Lugo ensured that all team members could use the new systems effectively. The help desk support was praised for its efficiency and patience, particularly in dealing with team members with unique roles.

**Security Measures:** The security measures implemented by Lugo were highly satisfactory, significantly improving the safety of the company's data. The company acknowledged that further improvements were needed on their side, particularly regarding server resources.

**Overall Experience:** The overall experience with Lugo was positive, with the company highlighting the importance of clear communication and a personalised approach. The presentations provided by Lugo helped in understanding the project and its objectives, reducing the fear of the unknown.

## FINAL THOUGHTS

The Royal Company of Merchants of The City of Edinburgh found Lugo to be professional, patient, and kind. The clear communication and personalised approach ensured that the project was successful and met the company's unique needs. The company highly recommends Lugo's services to other businesses, emphasising the value of conducting a thorough IT Gap Analysis before implementing solutions.

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