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CASE STUDY

Availability, Honesty and Trust: How a NY Investment Bank Found the Right IT Partner in Omega Systems

For a fast-moving financial services firm, downtime and slow response times aren't just inconvenient, they're a business risk. Here's how a New York investment bank moved from an internal IT model to a 24x7 managed partnership with Omega Systems, gaining round-the-clock availability, industry-specific expertise, and a relationship built on transparency.

This case study has been anonymized at the customer's request to protect the privacy and confidentiality of the financial services organization involved. Certain details have been modified or omitted to preserve the customer's anonymity.

Internal IT struggling with coverage

THE CHALLENGE

For years, this 50-employee New York investment bank managed its IT needs internally. As the pace of business increased, so did the risk of relying on a small internal team with limited after-hours coverage. In financial services, issues don't wait for business hours, and the firm's COO, Philip, and his team recognized they needed a partner who could match that pace.

Availability topped the list of requirements. The firm needed a provider who could respond quickly, including evenings and weekends – something an internal team stretched thin couldn't reliably guarantee.

> ***Availability was our top requirement.***
>
> ***As a financial firm, things move quickly, and we needed a partner who could respond fast, including on weekends and outside normal business hours.***
>
> ***From the start, Omega made it clear that responsiveness was core to how they operate.***
>
> **– Philip, COO**

In search of availability and responsiveness

FINDING THE RIGHT FIT

The firm's former CTO led a search that narrowed the field to three finalists, each of whom met with the firm's leadership team directly. Omega Systems stood out early, particularly for the responsiveness the team demonstrated from the very first conversations.

The firm also found an immediate rapport with Omega's team, a factor that mattered as much as the technical fit.

"We had instant comfort with the Omega team. They're reachable by phone or text whenever we need to escalate something, and they understand the nuances of financial services, so we don't have to explain our world from scratch."

Omega Systems takes total ownership of IT and cybersecurity for financial services firms – one unified team, fully accountable, always responsive. From day-to-day support to an in-house SOC, we help customers run smoothly, securely, and with confidence.

From light-touch to hands-on

IMPLEMENTATION

Onboarding for managed IT support and cybersecurity services was initially led by the firm's technology leadership, with limited direct involvement from Philip. Over time, Philip took on a more direct role working with the Omega team, sending over a list of needs and establishing a cadence of twice-weekly calls.

What began as a standard managed services relationship evolved into a genuinely collaborative one. Rather than simply fulfilling requests, Omega's team took time to evaluate what the firm actually needed, in some cases recommending less than what was initially requested.



"They'll actually tell you when you don't need something. That kind of honesty builds real trust."

Availability, expertise and partnership

THE OUTCOME

As a self-described "simple shop," the firm's needs weren't complex, but the value of a responsive, knowledgeable partner has been significant. Omega's round-the-clock availability, combined with a team that understands the operational realities of financial services, has removed friction that might otherwise slow the firm down.

Cost transparency has also been a differentiator. Rather than upselling services the firm didn't need, Omega's team has consistently put pricing and recommendations in a transparent perspective, reinforcing trust over the course of the relationship.

"If a peer at another financial services firm asked me about Omega, I'd point to availability, honesty, and ease of working together. The work is good, but so are the people, and that matters as much as the technical side."

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