

## CASE STUDY

# Cloud Enables CPA Firm to Accrue Maximum Productivity

Cutting-edge, customized cloud-based technology enables multi-office certified public accounting (CPA) firm to deploy mobile workforce to provide premier level of service and customer support.

## Large East Coast CPA Firm

Dave F., CIO

## Background

Large East Coast CPA Firm is a multi-office certified public accounting (CPA) and advisory firm dedicated to delivering external audit, tax and advisory services. The accounting firm provides services to three distinct industry niche markets— Insurance, Nonprofit, and Employee Benefit Plans. Founded in 1986 and headquartered in Vienna, Virginia, the firm has eight locations and 250 employees.

## Challenges

Large East Coast CPA Firm truly values its employees and believes in a strong work-life balance. Additionally, many of the accounting firm's staff work remotely at client sites. Because of this, the accounting firm's offices across the country utilized a traditional computer management solution with remote access capabilities provided by another cloud service vendor. Unfortunately, during this time, the firm ran into problems with application integration and cross-office collaboration due to recurring IT issues from poor connectivity and accessibility.

*According to David F., CIO, Large East Coast CPA Firm, "We had issues with our applications and software running properly when staff in different geographical locations worked on the same audits. Our previous provider did not have the knowledge of our accounting software to fix these issues and could not develop a better solution that would fit our needs."*

The firm was forced to utilize a "cookie-cutter" solution that did not meet the firm's IT needs because they found it difficult to identify an alternative vendor capable of thinking "outside of the box" and developing a customized solution for an organization of its size.

## At a Glance

### Background

- A public accounting and advisory firm that has been in business for more than 30 years.
- Predominately audit based and focuses on servicing insurance, commercial business and nonprofit organizations.
- Headquartered in Vienna, Virginia, the firm employs 250 professionals.

### Challenges

- Issues with cross-office collaboration caused by poor connectivity and accessibility.
- Previous cloud provider's lack of experience hosting and supporting accounting-specific software.
- Forced to utilize a "cookie-cutter" solution that did not meet the firm's IT needs.



## Solution

Large East Coast CPA Firm sought a provider that would work with them to develop a customized solution to meet its IT needs and allow its employees to work remotely without interruption.

The firm turned to Cetrom to develop a customized and unique cloud computing solution with virtual desktop capabilities. Cetrom's cloud solution is backed by the company's extensive experience hosting and supporting accounting-specific applications and software knowledge.

**Dave F. says,** *"We knew what we were looking to do was quite a bit off or out of bounds for nearly every other company. It was critical for us to find a company that possessed extensive accounting-specific knowledge as well as virtual desktop expertise. Cetrom was really the only company willing to work with us to make our IT vision a reality."*

## Results

Cetrom worked with the firm to smoothly migrate its applications and data from its previous cloud provider's environment to Cetrom's hosted environment without any disruption or downtime. With Cetrom's hosted virtual desktop solution in place, the firm's staff has been empowered by added mobility and connectivity. Additionally, the company's IT operations have been improved and overhead costs have been reduced.

The firm's employees can now access their desktops, applications and data from any location without any interruptions. This added mobility and connectivity has enabled staff members to be more productive and provide better service to their clients, while also enjoying an improved work-life balance.

**Dave F. comments,** *"Working with Cetrom has allowed us to better secure our desktop infrastructure. The solution not only meets our security needs, but also our staff's mobility needs. Making sure the system is up and is reliable is inherent in the virtual desktop solution, but it is also critical to our people's success."*

By outsourcing the system to Cetrom, the firm has been able to reduce overhead costs and reorganize its operations to be lean. The company no longer has to purchase costly IT equipment, or update licenses. The firm is more agile and has the ability to expand quickly and cost efficiently. In addition, the firm benefits from enhanced customer service and support from tier-3 engineers who respond quickly to any issues, update programs and proactively monitor for security threats.

## At a Glance

### Solution

- A customized cloud computing solution with virtual desktop capabilities developed by Cetrom.
- Cetrom has extensive accounting-specific application and software knowledge and hosting expertise.

### Results

- Improved work-life balance as a result of increased mobility and connectivity.
- Reduced IT responsibilities and overhead costs.
- Enabled the firm to become a lean and agile business.
- Enhanced customer support provided by knowledgeable tier-3 engineers.

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**Dave F. says,** *"Selecting Cetrom to host our virtual desktop and manage our IT eliminates a lot of the day-to-day IT responsibilities we had when working with our previous provider. Outsourcing everything to Cetrom has been great and gives me peace of mind knowing that we're working with a company whose expertise enables them to take on the burden of managing our entire system."*



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Inc.5000 | 500

