

**CASE STUDY**

# CPA-Focused Cloud Supports Firm's Goal of Enhanced Mobility

Five-star rated cloud-based technology helps CPA firm cut IT costs and work seamlessly from any location

## Small-sized Midwest CPA Firm

*Jake S., Tax Manager*

### Background

Small-sized Midwest CPA Firm of certified public accountants (CPAs) focused on helping individuals and small businesses navigate diverse financial and tax issues. Since 1983, They have been focused on providing personalized programs, continuity of service and relatable explanations of complex financial issues.

Headquartered in Chicago, the firm provides taxation services for individuals, trusts and nonprofits. They also offers personal financial planning and business services, including financial statement compilations and insurance loss analysis.

### Challenges

They previously had a third-party consultant maintaining multiple on and off-site servers and back-up servers. The consultant was responsible for the overall maintenance, backups and updates of the firm's servers and workstations. However, the solution was becoming more uneconomical and required high IT costs for hardware and software updates.

Their employees suffered when trying to work remotely because the traditional setup of using remote desktop was slow and riddled with connectivity issues. The firm had limited mobility due to having on-site servers, which had additional costs associated with setting up a local area network (LAN) at any new location, such as a client site or employee's residence.

*According to Jake S., tax manager, "The solution we had in place was becoming too expensive and did not allow our employees to get work done effectively. Additionally, the third-party consultant we were working with made us feel alienated because they left us in the dark about any and all IT-related decisions and issues."*

### At a Glance

#### Background

- Small-sized Midwest CPA Firm that helps individuals and small businesses navigate diverse financial and tax issues.
- Predominately focused on providing personalized programs, continuity of service and relatable explanations of complex financial issues.
- Headquartered in Chicago and founded in 1983, the firm has one location.

#### Challenges

- Expensive annual IT costs for purchasing new hardware and updating software licenses.
- Third-party consultant did not communicate any IT-related issues or concerns to executives.
- Traditional remote desktop setup was slow and had ongoing connectivity issues.

## Solution

They desired a cloud service vendor that worked exclusively with accounting firms and had experience with its various accounting and tax preparation software.

The firm conducted extensive research to find several cloud IT solution providers that serviced accountants. Their executives compared a number of vendors' delivery platforms (Citrix or remote desktop protocol [RDP]), backups/redundancies, hosted programs, user interface, file-sharing and client support against estimated costs. Although some companies marketed themselves as only CPA cloud providers and required less of an investment, they lacked strong support, delivery of services and benefits.

They turned to [Cetrom](#) to develop a customized hosted application cloud computing configuration. Cetrom's cloud solution is backed by the company's extensive experience hosting and supporting accounting-specific applications and software knowledge. Cetrom's solution hosts all of the business and accounting applications that they needed for daily tasks, including ProSystem Fx Tax, ProSystem Fx Scan, Practice CS, QuickBooks Desktop, Microsoft Office Suite, web browsers and Adobe Pro.

*Jake S. says, "We felt that Cetrom offered excellent services at a moderate price and we liked the Citrix delivery platform because it felt superior to a traditional RDP setup we were accustomed to seeing. Cetrom was flexible in meeting our specific demands and their backups, security and fail-safe data redundancies led us to be confident in their uptime and the well-being of our client data."*

## Results

In mid-August, Cetrom began working with them on the initial development process, including data backup. It culminated with the onsite migration the weekend of Sept. 17 and the solution was live Monday morning on Sept. 19 by the time their employees came to work.

By implementing Cetrom's [CPA-focused hosted cloud solution](#), they have been able to become more mobile at a reduced cost. Their client service and satisfaction have been approved from the added mobility, which allows accountants to work from any location with the same capabilities as working in the office. Their employees can now be in contact with their clients and provide services even outside of business hours from their mobile devices and home computers.

Their solution and devices are proactively monitored and supported by Cetrom's team of tier-3 engineers. During the migration, Cetrom provides a dedicated project manager who is knowledgeable on the solution, applications and devices. Additionally, Cetrom provides ongoing technical support 24/7/365.

*Jake S. says, "Our migration process with Cetrom was very smooth and we had an excellent experience with their support during the demo process. We have 24/7 monitoring on our onsite equipment and they have the ability to support our local workstations if we have any issues."*

With the migration and new cloud setup, their employees also enjoy having their email and calendars work seamlessly. Previously, employees' work remote desktop did not sync with their mobile devices or web mail. Now, when an update is made to their Outlook calendar, contacts or emails in one place, it automatically syncs across all devices. Cetrom also assisted them with the selection of new hardware and software, including Lenovo laptops with docking stations as well as the firewall.

## At a Glance

### Solution

- A customized hosted application cloud computing configuration developed by Cetrom.
- They selected Cetrom for its extensive accounting-specific application and software knowledge and hosting expertise.
- Cetrom recommended new equipment and security applications that would protect their client data.

### Results

- Expected two year IT costs will be reduced by about 25 percent from organization's historic average.
- Increased client service and satisfaction from enhanced mobility and connectivity.
- They have access to Cetrom support 24/7 provided by knowledgeable tier-3 engineers.

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**Jake S. concluded, "The decision to migrate to the cloud was one of the best business decisions we have made. It required an investment, but we have determined that our year two IT costs will be reduced by more than 25 percent from our historic average. We couldn't be happier with Cetrom's service and support."**



Cetrom ranked in top 5% of all Microsoft Partners for Customer Satisfaction

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