

CASE STUDY

After IT Disaster, Cetrom’s Cloud-Based Services Enable Mid-Sized CPA Firm to Regroup and Get Ahead for Teleworking Options

A CPA firm needed a new IT solutions provider after an IT disaster. Read Cetrom’s case study about helping a CPA firm go paperless and cloud-based right before the pandemic hit.

Background

Cetrom is a top-rated cloud solutions provider primarily serving CPA firms. Founded in 2001, Cetrom was an early adopter of the technology that eventually became the cloud and has been an industry innovator and leader ever since.

In addition to providing top-of-the-line, enterprise-level cloud solutions, Cetrom manages secure and effective migration, delivers a reliable virtual desktop infrastructure, provides multiple AI security technologies to help secure systems like Microsoft 365, and proactive patch management. Our clients include CPA and financial advisory firms of all sizes and specializations, but this case study focuses on our work for one valued client in particular.

Based in California, this Midsize CPA Firm is a top 150 accounting firm with 35 professional CPAs on staff. They provide various services to individuals, municipalities, and businesses in construction, professional services, wholesale distribution, and other industries. They offer advisory services, tax services, individual services, business accounting, audit and assurance, non-profit services, payroll services, and sales and use tax review. However, they had trouble finding reliable IT services for their accounting firm, which later caused significant problems.

Challenges

The Midsize CPA Firm had trouble securing a reliable information technology (IT) service that knew how their accounting applications worked and when to do updates without disturbing their accounting and tax operations. While they had employed an IT company for their firm, the IT company failed to fully understand the firm’s accounting programs. The final straw for finding a new vendor was when the IT company ran an update to one of the firm’s core applications and it crashed. The mistake cost the firm a week’s worth of work and lost data. The Midsize CPA Firm realized that they needed to make a change and started looking at other cloud providers who focused on accounting applications. They did some research, including reaching out to a professional acquaintance at another accounting firm who strongly vouched for Cetrom. They touted Cetrom’s platform, security, support, and controlled growth model.

At a Glance

Background

- Provides customizable cloud hosting solutions for CPA and advisory firms of all sizes and specializations.
- Manages secure and effective migration, delivers a reliable virtual desktop infrastructure, provides multiple AI security technologies to secure systems, and offers proactive patch management.

Challenges

- Difficulty securing a reliable IT service capable of handling accounting applications.
- Suffered major loss because of the previous IT service provider.
- Began researching and seeking opinions from trusted industry professionals.

Based on their research and opinions from trusted industry professionals, the Midsize CPA Firm made a final decision on their next IT service provider. According to Rob G., "We made the jump to Cetrom and never look[ed] back." After having gone through the nightmare IT crisis and receiving little to no help, Rob G. praises Cetrom's stellar customer service, saying "We love that Cetrom Support knows us, they know our programs, and they are responsive." He can ring up the company and their techs work on fixing the issue right away.

Solutions

Little did they know that when the Midsize CPA Firm came on board with Cetrom in November 2019, the global pandemic was right around the corner and would cause a massive shift in working conditions. When the stay-at-home orders were issued, suddenly workplaces had to go remote and employees were left scrambling (or laid off entirely). However, the Midsize CPA Firm was well prepared for this massive shift because their cloud-based system was already in place for employees to access anywhere.

"Employees grabbed their laptops, unplugged their phones, and went home for months. Yet, everyone remained connected. When covid hit, our team was able to grab all their stuff and work from home and that's all thanks to Cetrom. We can work from anywhere. We couldn't be happier with our decision to go with Cetrom." — Rob G.

Fortunately, Cetrom had set up the cloud-based platform for the Midsize CPA Firm prior to March 2020. Their employees could easily log in from anywhere to access email, records, and other documents on the cloud.

Accounting and tax firms live for paper records, but in the modern workplace, paper-based work environments have significant drawbacks in today's digital, pandemic world. Cetrom helped the Midsize CPA Firm make the shift to being paperless. As Rob G. said, "We had big initiatives to go paperless and going to the cloud was a huge proponent of that." Thankfully, the firm had already started the transition to cloud-based computing and going paperless with Cetrom's help. Employees could now access their documents from wherever and did not have to go into the office to get files. Proactively turning to the cloud to go paperless made work life easier, more efficient, and safer.

Results

Even though the Midsize CPA Firm had to go remote with millions of other CPA firms, their operations did not miss a beat. Cetrom's cloud-based services enabled a smooth transition to teleworking. "If we didn't have the cloud, we would have lost a section of our staff who didn't feel comfortable working in the office due to covid," said Rob G. While the Midsize CPA Firm survived with most of their staff intact, other businesses were not so fortunate.

While the pandemic continues to make headlines, another major news event in 2021 was "The Great Resignation," also known as the "Big Quit." Workers were voluntarily quitting their jobs, especially mid-career employees. Many were rethinking their career choices, which included working from home. Had the Midsize CPA Firm not made the switch to Cetrom's cloud-based platform, they might have lost many of their staff due to their inability to be completely remote, which would have hit them hard. Fortunately, the Midsize CPA Firm had switched to Cetrom's cloud-based platform, so they were able to continue offering their employees work-from-home and work-from-anywhere environments. Not only was the firm able to retain their talent, but they were able to recruit new talent because they could offer remote work options. Unlike other non-remote CPA firms that suddenly faced a talent shortage, this Midsize CPA Firm continued to thrive and grow.

Digital transformation and the pandemic aftermath have continued to push services to the cloud. Organizations that act quickly to embrace the cloud can continue operations, become more efficient, and retain and attract workers with their teleworking abilities. Contact us today with any questions about and all of the cloud services we offer for CPA firms.

At a Glance

Solutions

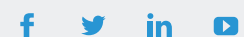
- Turned to Cetrom for exceptional support service and application hosting expertise.
- Cetrom enabled the Midsize CPA Firm to make an easy transition to a remote work environment when faced with the pandemic.
- Shifted from a paper-based work environment by leveraging the cloud.

Results

- Maintained access to emails, records, and files while working remotely.
- Retained staff and hired new talent despite nationwide trends of employees quitting their jobs.
- Continued to thrive throughout the pandemic thanks to proactively transitioning to the cloud.

Visit www.cetrom.net!

Scan this code to learn how Cetrom services can help your organization.



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

