



CASE STUDY

Stellar Cloud Migration Combined with Excellent Customer Service Wins New Clients

A Midsize CPA Firm needed a new cloud solutions provider. Read Cetrom's case study about their successful migration.

Background

Cetrom is a top rated cloud hosting solutions provider for CPA Firms. Founded in 2001, Cetrom was an early solution provider for 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 migration and offers expertise in hosting accounting specific applications, Microsoft 365 and a wide range of other application suites. Our clients include CPA and financial advisory firms of all sizes and specializations, but this case study focuses on the work we have done for one mid-sized CPA Firm, in particular.

The Midsize CPA Firm is a client-centered accounting firm that's been in business for 75 years. They provide a wide variety of financial services primarily for manufacturing, not-for-profits, and private companies. Based in North Carolina with about 50 staff members, their mission drives client access and includes having an open door, a welcoming attitude, and an empathetic approach. However, their first cloud resource provider did not fulfill their needs.

Challenges

When asked about their experiences with their prior cloud service provider, customers let us know what challenges they faced before joining Cetrom. According to Holly H., "Our previous provider started growing exponentially. You started to see their rapid growth and its effect on the level of support they were providing. This required more of our time to coordinate and troubleshoot issues. Many times, our staff would put a Band-Aid around the problem as a work around to avoid calling support."

Thanks to about 50 staff members, the enterprise meets client needs through a combination of industry-leading expertise, creative and cutting-edge solutions, and

At a Glance

Background

- Cetrom is a top rated cloud solutions provider primarily serving CPA Firms.
- We manage secure and effective migration, hybrid cloud solutions, and the hosting of cloud-based applications, email management systems, and virtual desktop infrastructure.
- Clients include CPA and financial advisory firms of all sizes and specializations.

Challenges

- Previous provider gave them the runaround when called.
- Unclear communication on who exactly to talk to and what industry language to use.
- A disconnect formed between the client and the previous provider, and then issues would not get fixed.
- Poor communication resulted in a "Band-Aid" approach to resolving problems.

responsiveness. They pride themselves on supporting both their clients and community and Cetrom has been playing an increasing part in their long-term success.

"You can definitely tell that when you call in to Cetrom Support that you're dealing with people well-versed or experienced versus our previous provider where the people that answer the phones were mostly their interns." — Holly H., Operations

Solutions

Due to the customer service and communication challenges they faced with their prior firm, the Midsize CPA Firm decided to switch to Cetrom. When asked about what caused the company to choose Cetrom, Holly H. stated: Cetrom's stellar industry reputation.

"There were some very positive reviews that came from some other firms that we knew of that used Cetrom," she said.

"We talked with a firm that had transitioned just a month or two before we started making calls, and they indicated that the migration was super easy, that it was the best decision they made. The level of service was above the other guys [in the market]. We talked with a couple of other firms that had migrated from our previous provider to Cetrom because we were interested in that kind of dynamic. I think sometimes there's such a steep curve when you go into a cloud environment that you can perhaps miss some of the negatives. So, we wanted to talk with firms, too, that were already in the cloud of some sort. But, they also were very high on their experience with Cetrom, comparing the previous provider level of services."

Having confidence in your cloud service provider is really the key and the Midsize CPA Firm has really been able to achieve that confidence with Cetrom.

After challenges with their current cloud provider, the Midsize CPA Firm was concerned about the level of service they would get with Cetrom. Fortunately, we were able to rise to the occasion whenever a need occurred.

Results

Cetrom works hard for every client. And at the end of the day, this elicited a glowing endorsement from the Midsize CPA Firm.

"I would say I would 100% recommend somebody to look into the cloud as a solution to their work environment for a cloud-based environment and to protect against cyberattacks. For me it has minimized my ability to or my need to worry about it. But, of course, it's a part of my job to worry about it. But instead of worrying about: are we going to be able to stay online? Is the tax software functioning correctly? I'm worrying more about big picture things instead. And that lets me worry about areas that we can improve on to make us better accountants for our clients versus worrying about just how something's going to work." — Holly H., Operations

Digital transformation is pushing all of our services to the cloud, and organizations like Gillam Bell Moser that act quickly can capture a competitive advantage. Contact us today with any questions about all of the cloud services we offer for CPA firms.

At a Glance

Solutions

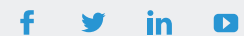
- The client looked for a firm that would listen to their issues and resolve them without a Band-Aid approach.
- They wanted a service provider who would be reliable to get to the root of the problem without communication issues.
- Similar firms recommended Cetrom for their cloud-based migration and stellar customer services.

Results

- Better communication between the service provider and the client helps resolve issues faster.
- Increased performance and upgraded customer service for our clients result in a better work environment.
- Glowing recommendations from our clients who are very happy with our cloud-based solutions and customer service.

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

