



CASE STUDY

CPA Firm Cashes In On Increased Productivity and Reduced Downtime

Leading Washington, D.C. region CPA firm implements customized, cloud-based technology solution with top-tier IT support to empower staff with remote access and improve customer service.

Background

Mid-sized East Coast CPA Firm is a certified public accounting (CPA) firm that has served the Washington, D.C. region for over 40 years. As one of the largest local firms in the area, they offer comprehensive accounting, tax and business advisory services for privately held businesses, medical practices, real estate firms, law firms, government contractors, nonprofit organizations and construction companies, as well as for professionals and business owners. Located in Reston, Virginia, they employ over 60 tax and accounting professionals.

Challenges

They moved from its in-house IT solution to a cloud infrastructure serviced and supported by a small cloud computing provider. During its time, they ran into problems with accessibility, application integration and lost productivity due to extensive downtime and daily IT maintenance issues.

Their staff had connectivity problems when trying to access the infrastructure from remote desktops. The cloud solution had designated servers for the employees to log in to when working remotely. However, when too many employees tried to log in, the servers would reach their bandwidth limit and lose connectivity. Additionally, the organization not only had difficulty with the service working properly, but it also lacked support from the provider.

According to Brian M., CPA, CITP, partner, "When our software and applications didn't work properly, we couldn't get prompt fixes and typically had to communicate problems to multiple lower level support technicians. It was frustrating because our staff lost valuable time going through the tiers before finding somebody who could actually help them."

Mid-sized East Coast CPA Firm

Brian M., CPA, CITP, Partner

At a Glance

Background

- As one of the Washington, D.C. metro area's largest CPA firms, they provide accounting, tax, audit and business advisory services to businesses and high-wealth individuals.
- Headquartered in Reston, Virginia, the firm has 60 employees.

Challenges

- Excessive downtime led to lost revenue and decreased productivity.
- Poor connectivity and low server bandwidth prevented staff from working from home.
- Previous cloud provider's lack of customer support and failure to fix IT issues promptly.

Solution

They needed to find a better IT provider and solution with higher level customer support so its staff productivity levels wouldn't be affected by downtime. The company began searching for a new cloud provider and invited their top choices for in-person presentations.

Cetrom was one of three cloud providers chosen to present its services, pricing and a solution to their challenges that could deliver results at a reasonable price. The other two providers specifically marketed to CPA firms and small-to-medium-sized businesses, which meant they would be an ideal client. However, Brian M. had met Cetrom's CEO, Christopher Stark, at a past American Institute of Certified Public Accountants (AICPA) conference in Las Vegas and already knew of the company's capabilities and proven expertise in providing excellent support and service.

Brian M. comments, *"Two of the three companies we interviewed had support structures with Tier 1, 2 and 3 technicians, similar to most IT providers. We were accustomed to having IT and support issues with our previous provider that used the same structure. So, when we learned that Cetrom only had Tier 3 engineers working on their accounts, we knew they'd get the job done very quickly and effectively."*

Additionally, Cetrom possessed extensive experience hosting industry-specific applications. Their staff uses more than 40 accounting software programs and applications, such as CCH, to do daily client work. In the past, their provider struggled with applications working together, which disrupted client work. Cetrom's expertise in hosting applications meant the interconnectivity among multiple applications would be seamless and their accountants could focus on managing client work.

Results

Cetrom's technical team began the migration on a Friday evening and had the entire system—applications and data—moved to the Cetrom environment and running properly prior to employees returning to work Monday morning. Cetrom's Tier 3 support engineers were on site to help onboard staff to the new environment and to ensure a successful transition. Selecting Cetrom and its custom Hybrid Cloud Computing solution has given them enhanced mobility, security and support, while giving company executives the peace of mind of having a reliable technology infrastructure.

The cloud solution enables their staff to access their applications from any device, anywhere. This added mobility also allows staff to work from home during tax season, as well as when inclement weather occurs to be more efficient and more accessible to their clients. The company has maintained higher levels of productivity since moving to Cetrom's solution, resulting in them providing better service to clients.

Brian M. says, *"With our previous provider, we lost whole days of work, including during tax season. Those days cost us tens of thousands of dollars in lost revenue."*

Cetrom also provides a sandbox or testing environment where they can experiment with new applications, and work out any hiccups, prior to going live with client data. Because of this, they have the capability to try out new applications that can assist staff in providing better accounting services in the long run.

At a Glance

Solution

- Cetrom's Cloud Computing solution backed by proactive 24x7x365 monitoring and enhanced support to prevent downtime and eliminate interruptions.
- Extra level of redundancy with onsite replication of all cloud-based resources and applications.
- Expertise in hosting and supporting accounting-specific software and applications and making them work seamlessly together.

Results

- Increased productivity and eliminated risk of losing revenue.
- Higher level of customer service backed by Cetrom's Tier 3 engineers.
- Increased mobility and connectivity with anywhere, anytime access via any device.
- Their staff became more accessible to clients, resulting in better overall service.

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Brian M. concludes, *"We are extremely happy with the service and support we receive from Cetrom. Our staff is more efficient overall in our day-to-day activities and we don't have any downtime. It's a good feeling knowing we have them in our corner to guide us in making the right IT decisions."*



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

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