

CASE STUDY

It's a "Rocky Mountain High" for Boulder, Colorado CPA Firm



Cetrom's customized cloud computing solution for accountants yields peace of mind from greater data security, cost savings and employee productivity.



Background

Graham & Company, P.C., headquartered in Boulder, Colorado, is a CPA and consulting firm that specializes in tax planning and services for individuals and businesses. Clients include companies in the real estate sector, high net worth individuals, and expatriates and foreign nationals, among others.

The company employs eight individuals, with three working remotely in Ohio and Illinois. Many Boulder staff members also choose to split their work schedule between office and home.

Challenges

According to John Graham, owner, the company faced a number of technology-related issues. First, there was the uncertainty created by its IT service provider. When problems arose, he had to call, leave a message and then wait. He never knew exactly when a technician would arrive and, once on site, he had no idea how long problem resolution would take. Downtime was a growing concern.

Then, too, his technology was not well suited to employees working remotely. As configured, all employees, regardless of physical location, required a dedicated computer workstation in the Boulder office. Remote workers required a second workstation to access the office computer to connect to company files and software programs. Beyond the fact that maintaining duplicate hardware was expensive, reliance on a single server meant all work ceased at every locale when the server was down.

Peace of mind was Graham's biggest concern of all. He relates spending "many sleepless nights" worrying about the safety and security of company data should a theft, natural disaster, hack or other untoward event occur.

With his server nearing the end of its lifecycle, he knew it was time to act.

At a Glance

Background

- Graham & Company is a CPA and consulting company located in Boulder, Colorado.
- The firm specializes in tax planning for individuals and businesses to minimize taxes and maximize cash flow.

Challenges

- Uncertainty and prolonged downtime existed when IT problems arose due to undefined response and resolution times.
- Technology was aging and ill suited to the remote work style of employees.
- Data safety and security were major concerns that absorbed a great deal of the owner's time.

Solution

Graham began an extensive vendor vetting process in summer 2013. He recalls, "Even though it was just a few years ago, no one I knew had made the switch to the cloud. That made it a scary endeavor. Would it work? How? Would it be effective?"

At the American Institute of CPAs (AICPA) conference, he learned about [Cetrom, Inc.](#), an industry-leading provider of custom cloud solutions. He was impressed by its comprehensive and full range of IT solutions and services including full cloud [migration](#) and implementation, proactive managed services and [round-the-clock support](#). In particular, Cetrom's unmatched [zero downtime](#) record meant Graham & Company staff could [access](#) data from the cloud, as well as receive timely technical support, any time 24/7/365 from anywhere. Graham adds, "The consistency of Cetrom's messaging provided a comfort level in working with the firm."

Cetrom designed a custom full cloud solution for Graham & Company, which includes hosting all of the firm's accounting solutions (Lacerte, Act!, Creative Solutions Accounting, QuickBooks, SurePrep, CFS Tax Tools and XCM Integration). Graham characterizes the entire effort as "seamless" with the solution going live flawlessly on time as scheduled. Graham relates, "I believe we were the first CPA firm to have Cetrom host our tax software. Any anxieties I had were quickly dismissed. Cetrom made everything work from day 1."

Results

Graham cites "technology enhancements, cost savings and greater security" as benefits he's derived to date. He no longer needs to provide dual technology to support remote work and, if there is a weather-related power outage in Boulder, for example, remote workers can continue working unaware of any problems. His office-based staff can go home and resume working as long as they have power there. Freedom from on-site server downtime has increased employee productivity.

Graham adds, "Cetrom is focused on security and staying current with the latest updates. The requirement for two-factor authentication (2FA) increases my comfort level when it comes to protecting my clients' financial data. Beyond password entry, mobile phone authentication is required before access is granted."

However, for him, peace of mind is the greatest outcome of all. He explains, "Before, if something happened to our server, the company would be dead in the water. With Cetrom, my data undergoes multiple backups and is stored in secure data centers in different geographical areas. I don't have to worry about data recovery; they can recover it. And, there is always someone available to quickly resolve technical issues should they arise."

Graham & Company, P.C.: <http://www.grahamcpas.com/index.php>

Cloud Computing for CPAs: <http://www.cetrom.net/accounting-cpa-firm/>

At a Glance

Solution

- Cetrom's customized full cloud computing solution for accountants.
- Cetrom's virtual desktop solution that enables access from any location, any device at any time.

Results

- Technology redundancy was eliminated.
- Technology enhancements are yielding cost savings and greater staff productivity.
- Enhanced security, including two-factor authentication, protects client financial data from unauthorized access.
- Company data is safely backed up in secure data centers, protecting the firm's most valuable resource from natural disasters and other adverse events.
- John Graham possesses greater peace of mind knowing an expert solution provider is in control.

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"We're now better positioned to grow our company and deliver on the value proposition that guides us: Outstanding client service arising from professionalism, responsiveness and quality," concludes Graham.