

**CASE STUDY**

# CPA Firm Battling Poor Support And Frequent Downtime Turns To Cetrom For Help

A small-sized West Coast CPA firm took a big risk by leaving a long-term partnership with an established yet poorly performing cloud partner. Instead of choosing the status quo, they went in search of a new cloud services firm and the risk has paid off.

## Background

This small-sized West Coast CPA firm is a full-service certified public accounting firm located in Southern California. The firm acts as trusted advisors to its clients and is deeply committed to delivering outstanding, holistic, value-driven service that fosters trust and establishes long-term partnerships. This firm partners with a wide range of organizations in the real estate, technology, biotech, insurance, agribusiness, manufacturing, and non-profit sectors.

## Challenges

This small-sized West Coast CPA firm had been engaged with another well-known cloud service provider for approximately five years. As the end of the contract approached, the firm's team started to experience a downturn in service across a spectrum of critical areas. Ticket responses had become very slow, downtime increased in frequency and duration, and, even when up and running, the organization experienced significant network latency.

*"We had been with our cloud partner for a long while. We were happy with the cloud concept. We knew we were going to stay in the cloud and I started searching for a new partner when I came across Cetrom's 99.9% uptime claim. When I spoke to Cetrom, I asked what that actually meant. They told me that's what it really means. I was blown away as that had not been our experience." --Nancy M., Office Manager*

Dialogue continued between this small-sized West Coast CPA firm and several members of the Cetrom team. The firm also spoke with several of Cetrom's clients. The firm ultimately selected Cetrom as their cloud partner over four or five other qualified competitors.

## At a Glance

### Background

- The small-sized West Coast CPA firm partners with a wide range of organizations in the real estate, technology, biotech, insurance, agribusiness, manufacturing, and non-profit sectors.
- Headquartered in Southern California.

### Challenges

- Downturn in service across a spectrum of critical areas at the end of previous contract.
- Amidst significant network latency, downtime increased in frequency and duration.
- Ticket responses had become very slow.

## Solution

This small-sized West Coast CPA Firm has operated in a 100% Citrix environment with no locally installed software or onsite servers and wished to remain configured that way. Cetrom came on board and took control of the migration process. The migration, according to Maier, “went exactly as promised”, resulting in a smooth transition to Cetrom’s platform over the course of a weekend.

*“I had never been in a situation before where I wasn’t responsible for a big chunk of the work. When two Cetrom technicians came onsite, we all thought that might be a bit of overkill for a firm of our size, but in the end our partners were extremely happy. The experience with Cetrom’s migration team was remarkable.” --Nancy M., Office Manager*

Despite challenges obtaining data from their previous cloud partner, the Cetrom team worked closely with the prior partner to develop a workaround to transition the data to the new system, avoiding the possibility of a significant project delay. In the end, the migration went smoothly to Cetrom’s hosted environment without any disruption or downtime.

## Results

The small-sized West Coast CPA firm remains in a 100% Citrix environment today, but now has the Cetrom team handling application hosting, maintaining tight security, managing upgrades, and executing system back-ups. Support responses sometimes took days with their previous partner, causing serious challenges to productivity. Since partnering with Cetrom, the firm’s team has benefited significantly from vastly improved 24x7 tech support response times. Coordination with the firm’s software provider, CCH, has also seen significant improvement since Cetrom came on board. In addition to supporting, hosting and archiving their Microsoft Office Suite, Cetrom manages a host of important applications, including:

- Payroll System
- Pfx Client Manager
- Pfx Communications
- Pfx Dashboard
- Quickbooks
- Tax Tools
- SafeSend
- File in Time

By transitioning to Cetrom’s cloud platform and management services, the firm now enjoys 99.9% up-time, faster tech support response times from tier-3 engineers and significantly improved, more proactive infrastructure management across hosting, security and system maintenance. Most importantly, the small-sized West Coast CPA firm’s team can be confident that they’ll have constant access from anywhere to the data and applications they need to continuously provide outstanding service to their clients.

## 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 Cetrom’s geographically disparate data centers.
- 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.
- This small-sized West Coast CPA firm now enjoys minimal downtime.
- Made the transition in February during busy season.

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



*“Cetrom delivers on what it promises in terms of cost and timing. The team is knowledgeable and pleasant and no matter who takes a support call they are all coordinated, they understand our history and matters get resolved quickly. It’s been smooth and I have not had a single complaint from any level since we chose to jump ship over to Cetrom. It was a very good decision.” --Nancy M., Office Manager*



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

Microsoft Partner  
Gold Hosting  
Gold Server Platform

Inc.5000 | 500

