

Estate Planning Professionals: Network Service Plan & SBS Case Study

AccuNet

Business Systems ♦ Network Services

Solution Overview



ESTATE
Planning Professionals

Westerville, Ohio

www.eastwindcapital.org

Industry

Wealth Management

Scenario

Estate Planning Professionals (EPP) was in need of professional IT support to continue providing high quality service to their clients.

Solution

EPP chose AccuNet's Network Service Plan to act as their IT department, providing unlimited IT phone support, onsite and offsite monitoring, and monthly status reports. They also chose AccuNet to implement their new Microsoft Small Business Server 2003 R2.

Benefits

- ▶ Network Services Plan Support
- ▶ Shared Knowledge | Quick Turnaround
- ▶ Smooth Server Implementation

EPP Savings Comparison

On Staff IT		AccuNet NSP	
Salary	\$78,000	Monthly	\$740
Benefits	\$26,000	Unlimited phone support	
Cost to EPP	\$104,000	Proactive monthly reporting	
		Onsite & offsite monitoring	
		Fixed monthly billing	
		Dedicated IT consultants	
Time spent on IT = 1/3			
Costs to EPP		Costs to EPP	
\$34,666		\$8,880	
Per year		Per year	

\$25,786 Savings
per year



Estate Planning Professionals (EPP) specializes in providing comprehensive estate and business insurance, investment, and retirement planning. They employ teams of support staff personnel internally and externally throughout the country to provide comprehensive service to their clients. EPP has established a level of professionalism that far exceeds any industry standards to engender their client's confidence in their investing and planning expertise.

EPP relies on their network infrastructure to protect their client data, respond to clients in a timely manner, and maintain compliance with the SEC in order to provide such a high level of professional care to their clients.

SCENARIO

Amy Raidel of EPP is the typical overworked office manager. Not only is she responsible for the new applications for life insurance, annuities and so forth, but she processes all of the firm's new business, supervises two employees, performs all accounting, payroll, and human resource functions, and sets the agenda for the weekly staff meetings.

On top of all of these responsibilities she was also responsible for working with the on staff IT administrator to ensure their network system was always up and running securely. "One third of the on staff IT admin's time was dedicated to IT," says Raidel. "He wore many hats like the rest of us but he never seemed to have time to fix our issues or update our security patches."

"He would say, 'I'm going to fix such-and-such, but I haven't had time yet,'" continues Raidel who says she spent much of her time overseeing IT to make sure the issues that were raised were finally resolved.

SOLUTIONS

After some thought, EPP came to the conclusion that the unresolved problems with their network system were becoming too costly for their business and that something had to change. "Our IT administrator wasn't performing up to our expectations. He didn't give 100%," Raidel says. "We want our network to be current and to run without problems. If we have an issue we want to call someone who can answer us and not say, 'let me check on that.'"

When EPP started looking for a new server they decided it was time to look for more focused support. This led them to AccuNet, Inc., a Microsoft Gold Certified Partner with expertise in server implementation, maintenance, and support as well as a strong reputation for acting as or supplementing a business' IT department with the AccuNet Network Service Plan (NSP).

“There has never been one single time where I have tried to get in contact with AccuNet and they didn’t respond.”

With AccuNet, EPP was going to gain dedicated IT support with monthly network health checks and unlimited phone support, the shared knowledge of a team of highly experienced network consultants including Microsoft Certified System Engineers, and a smooth server migration project.

“Things have only gotten better because IT is AccuNet’s focus, it is their job,” says Raidel whose time has freed up from the burden of IT responsibilities. “I can rest assured knowing that if I have a problem, I don’t have to stop everything I am doing. I call the AccuNet help desk and they get right on it.”

Network Service Plan

Since EPP would be without an IT administrator, they saw the AccuNet Network Service Plan as the perfect fit for their needs. AccuNet’s Network Service Plan (NSP) offers EPP complete control and visibility into their network as well as emergency response, protection, setup, proactive monthly reporting, and unlimited phone support.

“It’s such a great feeling now having the monthly Network Service Plan check,” says the overworked office manager, Raidel. “You show me the monthly report, where we stand, what you updated, what small problems may potentially become bigger problems, and how to stop that from happening.”

“I’m so glad I have you guys to count on,” says Raidel. “When our phone system went down, even though you aren’t responsible for that, I called you because I didn’t know where to start. You had the phone system’s contact information written in our file. It was so easy.”

Shared Knowledge/Quick Turnaround

By working with AccuNet, EPP has access to the pool of knowledge and experience of a team of consultants. Because our consultants support many companies in Central Ohio, we see many of the same issues, including security and virus threats.

“I found with our in-house IT rep, there were a lot of unknowns” says Raidel. He seemed to find a lot of quick fixes instead of getting to the root of the problem.”

“With AccuNet servicing us, I see that they know the answer to most of our problems immediately. They don’t take the shortcut to go around it. The problem will be fixed the right way the first time.

Smooth Server Migration/Implementation

EPP was running out of space with their server and unhappy with their network speed. They turned to AccuNet to implement Microsoft Small Business Server 2003 R2 over the slow days around the Thanksgiving holiday.

“We planned the migration around a time when our office was slow so that it didn’t interrupt our workflow,” says Raidel. “I didn’t notice any delays or glitches, however. It didn’t slow us down.”

In fact, EPP noticed the increased in speed immediately. “We really rely on our server and we want the latest capabilities even though we aren’t a massive company,” she continues. “AccuNet provided that.”

With unlimited phone support, quick turnaround, and a new server, EPP feels that they are in a far better position than they were with an on staff IT administrator who wasn’t giving 100%. “In the end, we are better off because we have our service plan, our anti-virus, everything is constantly updated.”

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Network Service Plan

Our Network Service Plan provides consistent and solid support that will allow you and your organization to focus on the goals of your business and alleviate IT concerns.

The AccuNet Network Service Plan is designed to reduce the cost of technology ownership by offering your business direct access to a team with technical and operational expertise, better cost predictability for technical issues, and many other benefits that previously were enjoyed only by large companies and organizations.

The benefits of a Network Service Plan include:

- Preventive Maintenance
- Proactive Planning and Design
- Fixed Monthly Billings
- Onsite and Offsite Support and Maintenance
- Help Desk Support
- Emergency Response
- Proactive Monthly Reporting
- Monitoring of Key System Metrics
- Monthly Onsite Maintenance Visit & Status Report
- Dedicated AccuNet Network Services Consultant Team

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