

CASE STUDY

CPA Firm Moves to the Cloud to Better Support Clients

Cloud-based technology aids CPA firm in its mission to be more secure, effective and mobile

Background

Mid-sized West Coast CPA Firm, the largest, locally owned certified public accounting (CPA) firm located in Tacoma, Washington, provides comprehensive tax, accounting and consulting services to privately-held businesses and individuals. With one location, they focus on serving large construction companies, professional services, attorney firms, medical practices, real estate and nonprofit organizations.

Founded in 1936, their services include employee benefit plan audit services, audit, compilation and review services, tax planning and compliance, succession and business planning, estate planning and internal control assessments.

Challenges

Mid-sized West Coast CPA Firm and its employees utilized a traditional desktop IT configuration managed by one on-staff IT person and an outside consulting firm. The internal IT was primarily focused on keeping the desktop IT running while the outside consulting firm handled the network support. Although the consulting firm had login access to their system to manage the firm's backups and any server issues, the solution was ineffective and hindered staff from working remotely.

One of the biggest issues they suffered from was using CCH ProSystem fx Engagement while working remotely on client engagements. Employees could not check in and out of the software because they could not effectively access the network. This meant other users could not connect at the same time to collaborate or share documents which significantly impaired their ability to work on client engagements outside the office.

According to Karin T., administrator, "Our previous setup did not allow our employees to use one of the major programs required to complete their daily work while offsite. Additionally, we wanted to be proactive and lead the industry in moving to the cloud to not only enhance our overall productivity and security, but to also provide better, more efficient service to our clients."

Mid-sized West Coast CPA Firm

Karen T., Administrator

At a Glance

Background

- Mid-sized West Coast CPA Firm that provides tax, accounting and consulting services to privately-held businesses and individuals.
- Focused on servicing large construction companies, professional services, attorney firms, medical practices, real estate and nonprofit organizations.
- Headquartered in Tacoma, Washington and founded in 1936, the firm has one location.

Challenges

- Costly investment of having one onstaff IT person and outside consulting firm managing desktop IT and network support.
- Traditional remote desktop setup was ineffective and hindered employees working out of the office.

Solution

They desired a cloud solution that would enable its employees to seamlessly work from any location and gain access to its various accounting and tax preparation software when out on client engagements.

The firm enlisted the help of Donny Shimamoto and his company, Intraprise TechKnowlogies, LLC, to document its computer systems, programs and needs, as well as conduct extensive research to find several cloud IT solution providers that serviced accountants. With that information, their executives were able to compare a number of CPA-centric vendors and their delivery platforms and interfaces. Although some companies marketed themselves for their remote desktop capabilities, they found their interfaces and delivery of services not user-friendly.

Because of this, they turned to [Cetrom](#) to develop a customized, CPA-centric cloud computing configuration. Cetrom's cloud solution is backed by the company's team of tier-3 engineers and their extensive experience hosting and supporting accounting-specific applications and software.

Karin T. says, "Cetrom's services and support really stood out against the other cloud vendors. We thought their Citrix delivery platform would have a higher level of adoption because our employees would have the same desktop setup that they have grown accustomed to using— and it has. Cetrom also stressed the importance of their backups, data redundancies and overall security, which is extremely important because we're focused on protecting our clients' data."

Results

Cetrom worked directly with them throughout the entire migration process, from the initial migration steps to the system being successful and seamlessly migrated to the cloud in one weekend. By implementing Cetrom's CPA-centric hosted cloud solution, they have been able to become more mobile and its accountants can work from any location with the same capabilities as working in the office.

Karin T. adds, "Our accounting services users working in the field have greatly benefited from our migration to the cloud. They're now able to be much more efficient while working in a client's office because they have the ability to access and share files and information. It has dramatically increased our efficiency and we can complete engagements onsite."

In addition to cloud hosting, Cetrom and its CEO, Christopher Stark, has also provided them with valuable guidance and recommendations when considering new technology and platforms even outside of their product offerings.

Karin T. says, "When investigating new software and applications, we always utilize Cetrom as a resource because they work with so many CPA firms like ours. Cetrom is able to provide their insight on the technology as well as put us in contact with their clients that have already implemented the solution so that we can learn firsthand about their experiences— whether good or bad. Cetrom's recommendations have been really helpful when deciding to purchase new solutions and we have avoided wasting time and money from implemented solutions that wouldn't work."

The CPA firm's system and its clients' data are secure because it is being proactively monitored and supported by Cetrom's team of tier-3 engineers. Cetrom's team of engineers is available 24/7/365 for technical support to them if any issues arise.



At a Glance

Solution

- A customized CPA-centric cloud computing configuration developed by Cetrom.
- They selected Cetrom for its extensive accounting-specific application and software knowledge and user-friendly Citrix desktop.

Results

- Increased effectiveness and client support from enhanced mobility.
- 24/7/365 support provided by Cetrom's dedicated team of knowledgeable tier-3 engineers.
- Cetrom provides valuable recommendations and client references for other software and technology investments.

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Teles concluded, *"One of the things we appreciate wholeheartedly about working with Cetrom is how great the people in the service area are and the high-level of responsiveness we have received. I've been very pleased with the services Cetrom provides and I can't say enough about the people Cetrom hires. They're great resources and they reflect very well on Cetrom and its overall company service model."*



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Inc.5000 | 500

