![RIA WorkSpace logo]

RIA WORKSPACE ENDS THIS RIA'S QUEST FOR THE RIGHT IT PARTNER

Case Study

" I don't want to think about IT."

That's how this RIA defined a successful partnership with an IT services provider. Having worked with 2 different IT companies in 3 years before speaking with RIA WorkSpace, this RIA had some concerns about finding the right partner for their IT. As an RIA with 6 employees, they struggled to find an IT provider who took them seriously and didn't simply treat them like any other small business.

*Company name withheld for confidentiality.

BEFORE: PROBLEMS WITH THEIR PREVIOUS MSP

DISRUPTIVE ONBOARDING

- Previous managed IT services providers (MSPs) had a difficult, disruptive, and long onboarding process.
- Employees wanted better IT support but didn't want to go through difficult onboarding again.

POOR CUSTOMER SERVICE AND SLOW RESPONSE TIME

- The current provider offered poor customer service, sometimes taking weeks to respond to an issue. Employees were frustrated and their business and productivity was disrupted.
- Escalating requests didn't improve response times.
- They often wouldn't hear from the IT provider for several days even when requests were urgent.
- Didn't always work with the same technicians so they were unfamiliar with their needs and history.

ONGOING IT ISSUES

- Critical email disruptions persisted for two weeks, causing significant communication challenges. When the issue was resolved it was a simple fix that could have been resolved in a few hours. When the issues emerged again, the RIA questioned the IT provider's knowledge and competency.
- Lack of attention to detail like double paying vendors and spelling mistakes on documentation.

AFTER: SMOOTH ONBOARDING AND RESPONSIVE CUSTOMER SERVICE

EFFICIENT ONBOARDING AND ATTENTION TO DETAIL

- RIA WorkSpace has an assigned team member for onboarding. He has over 5 years of experience in the role and made the onboarding for this RIA seamless.
- The onboarding steps were clearly outlined in advance so everyone knew what to expect and what their involvement was.
- Cutover to the new platform happened outside of business hours so there was no disruption.
- Attention to detail eliminated financial losses caused by double payments.

## ENHANCED SECURITY AND IT COMPLIANCE

- The RIA WorkSpace team has in-depth knowledge of SEC IT requirements to support IT compliance.
- Security and IT compliance features required for RIAs like file, email, and Teams archiving, email encryption, data loss prevention, and advanced threat protection for email were all introduced as part of the standard RIA WorkSpace platform.

SWIFT ISSUE RESOLUTION AND IMPROVED CUSTOMER SERVICE

- RIA WorkSpace provides an assigned team that includes a Technical Account Manager, Primary Support Engineer, IT Manager, and a Helpdesk. This approach led to a significant improvement in customer service, addressing issues promptly and efficiently.
- Tickets are managed quickly with transparent response time standards. All requests are classified based on severity and each classification has a target response rate.

  - **Emergency response** service tickets are logged within 5 minutes with a 30-minute response time. These are for critical problems where your ability to conduct business has stopped (i.e. a server, network, or application is down).
  - **Fast response** service tickets are logged within 5 minutes with a 30-minute response time. These are for situations where an individual user is unable to conduct business (i.e. user cannot log into computer or access email).
  - **Quick response** service tickets are logged within 10 minutes with a 1-hour response time. These are for urgent problems where service is seriously degraded but you can continue to operate for a short time (i.e. very slow network performance, app function is down).
  - **Normal response** service tickets are logged within 1 hour and our response time is within one business day. These are for situations where an employee can still work but is not as productive (i.e. slow computer or cannot print to multiple printers).

A LOOK AT THEIR IT SUPPORT TODAY

RIA WorkSpace uses Smileback to capture feedback on each ticket submitted by clients.Here's a snapshot of 21 recent tickets and feedback from this RIA's employees.

Net CSAT Score

100.0

Reviews

21

21 0 0
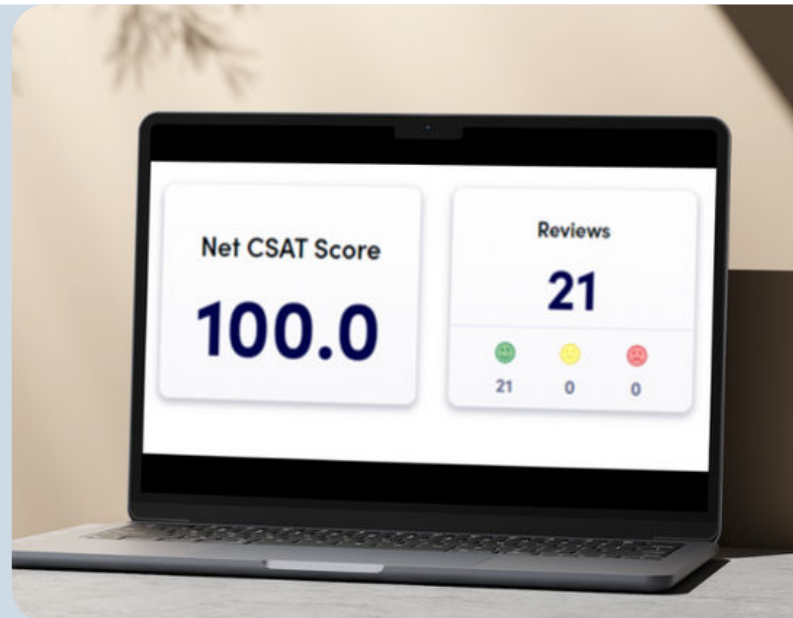
"Sam was very quick to respond to my issue and got me up and running again quickly."

"Promptly fixed."

"Great experience, fast response time."

"It was my first experience and the issues were promptly fixed."