FROM FRUSTRATION TO FREEDOM: RIA WORKSPACE'S PROACTIVE IT SOLUTIONS FOR A GROWING RIA

Case Study

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"This RIA has 13 employees across multiple locations and a growing number of remote workers. The Director of Operations found herself overwhelmed with troubleshooting the IT needs of the firm and managing their IT provider.
*Company name withheld for confidentiality.

BEFORE: PROBLEMS WITH THEIR PREVIOUS MSP

This RIA was working with a managed IT services provider (MSP) who did not specialize in RIAs. As a result, the RIA was treated like every other "small" client and no additional security measures were taken to protect the firms data.

POOR CUSTOMER SERVICE EXPERIENCE WITH PREVIOUS MSP

- The RIA experienced poor customer service with their previous MSP, including unresponsive teams and persistent issues.
- Limited support and inefficient issue resolution resulted in employee frustration and dissatisfaction.

TIME-CONSUMING TECH SUPPORT MANAGEMENT

- The Director of Operations was practically acting as an in-house IT person, troubleshooting issues due to a lack of confidence in their previous MSP.
- Desired an IT team to free up her time for strategic and operational responsibilities.

## INCONSISTENT SUPPORT TEAM AND LACK OF VISIBILITY

- Their previous MSP didn't provide an assigned team, leading to frustration and inefficiencies when the technician didn't understand their unique needs or past issues.
- Difficulty tracking open tickets for various employees, critical due to the number of remote workers.

BEFORE: PROBLEMS WITH THEIR PREVIOUS MSPS

DISORGANIZED AND INEFFICIENT IT

- Microsoft licensing was chaotic and inconsistent.
- They were using OneDrive which didn't serve their needs and wasn't managed effectively. Their MSP didn't recommend alternatives like SharePoint.
- They wanted a streamlined solution for licensing management and a well-organized file management solution like SharePoint.
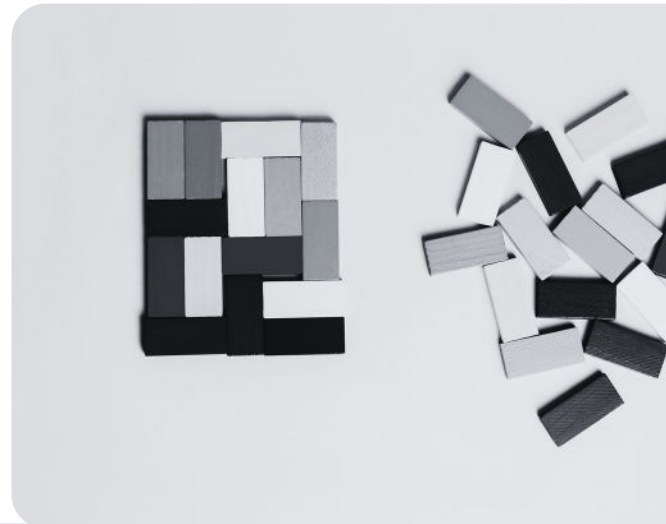
MISSING SINGLE SIGN-ON (SSO)

- They wanted SSO to enhance security and simplify employee access to systems and applications.
- Their previous MSP didn't offer this essential feature.

LACK OF CONFIDENCE IN SECURITY AND COMPLIANCE

- The RIA needed a comprehensive solution for employee onboarding and offboarding to minimize security risks.
- Lack of clarity on SEC IT requirements and concerns about remote employee security.

AFTER: RIA WORKSPACE'S ASSIGNED TEAM STREAMLINES AND SIMPLIFIES THEIR IT

IMPROVED CUSTOMER SERVICE AND RESPONSIVENESS

- Employees could now rely on a quick resolution of any issues by the RIA WorkSpace team, freeing the Director of Operations from IT-related tasks.
- RIA WorkSpace provided 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.
- A client portal was introduced for streamlined communication and easy issue tracking.

MICROSOFT LICENSING, SHAREPOINT, AND SINGLE-SIGN-ON

- RIA WorkSpace took charge of Microsoft licensing, ensuring accuracy and compliance.
- Migrated to SharePoint for a well-organized and efficient document management system.
- SSO is standard with RIA WorkSpace packages and was implemented during onboarding. This enhanced their security and simplifying user access.

IMPROVED SECURITY AND IT COMPLIANCE

- RIA WorkSpace streamlined the onboarding and offboarding processes, tying them to Microsoft accounts for swift adjustments.
- In-depth knowledge of SEC IT requirements ensured compliance.
- Features 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.

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 28 recent tickets and feedback from this RIA's employees.

Net CSAT Score
100.0

Reviews
21

21   0   0
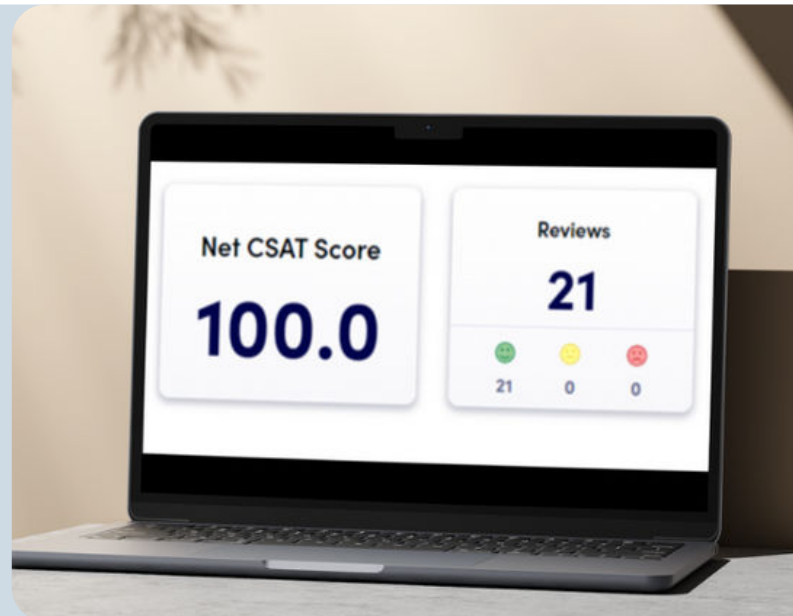
"I really appreciate the extra time and dedication Adel took to ensure this issues was completely resolved. It enables all of us to rest easy knowing our IT is in such good hands. Thank you very much."

"Kal successfully transferred our back-up data over from our previous IT provider. It was a bit of a mess on their end, and Kal straightened it all out. Thank you Kal!"

"Argenis did a wonderful job rebuilding our laptop for us. Thank you so much!"

"Thank you Adel for helping me get Code Two set-up! I have everyone's signatures up and running, and we couldn't be happier!"