

EMPOWERING A NEW RIA WITH SEAMLESS IT SOLUTIONS

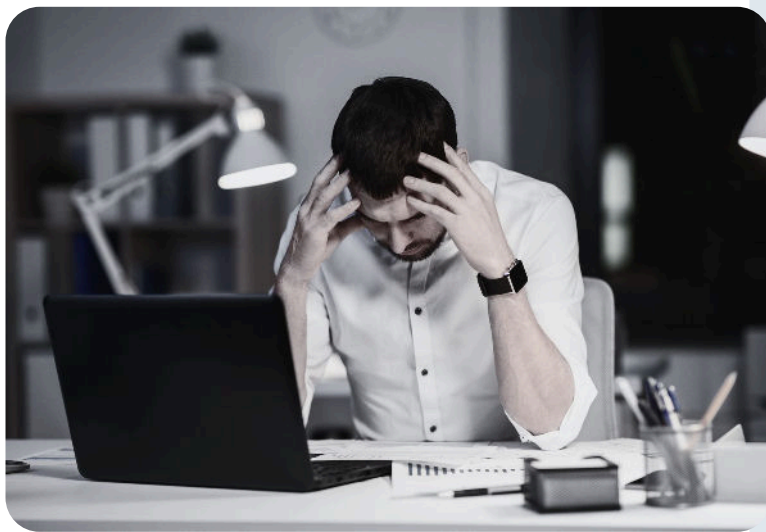
Case Study

Establishing a new RIA presents both opportunities and challenges. For a budding RIA with ambitions to rapidly establish itself in the market, navigating the intricacies of IT infrastructure, security, and remote work enablement is paramount. This case study delves into the journey of a confidential new RIA, facing the complexities of setting up a secure and productive environment for its three-member team. Tasked with addressing pressing concerns around security, feature parity, and remote work dynamics, the RIA turned to RIA WorkSpace for comprehensive IT solutions tailored to their unique needs.

THEIR CHALLENGES

SECURITY AND REMOTE WORK ENVIRONMENT

- Starting a new RIA with a remote workforce posed significant security challenges.
- Ensuring a secure environment for all employees working from home was a top priority



FEATURE PARITY AND PRODUCTIVITY NEEDS

- The founder aimed to get the new firm up and running with features similar to those he used at a larger RIA.
- Identifying and implementing essential security and productivity features quickly was crucial.

TIMELINE PRESSURE

- Starting a new RIA with a remote workforce posed significant security challenges.
- Ensuring a secure environment for all employees working from home was a top priority

CONSIDERATION OF VDI AND CITRIX

- They initially considered Virtual Desktop (VDI) and Citrix solutions due to familiarity with these platforms at the previous firm.
- Concerns over complexity, cost, and potential video/audio issues prompted exploration of alternative solutions.

UNDERSTANDING REMOTE WORK DYNAMICS

- Desired a comprehensive understanding of the intricacies of remote work for all employees to optimize productivity and collaboration.



WHAT RIA WORKSPACE DID

ENTERPRISE SECURITY AND SECURE PLATFORM

- RIA WorkSpace provided an enterprise-grade security platform, ensuring robust protection despite the small team size.
- Implementation of advanced security measures safeguarded sensitive data and communications.



SECURE AND PRODUCTIVE REMOTE WORK SETUP

- RIA WorkSpace enabled secure and productive remote work for all employees, offering seamless access to necessary tools and resources.
- Collaboration tools such as file sharing and real-time document collaboration facilitated efficient teamwork.



STREAMLINED COLLABORATION TOOLS

- Leveraging RIA WorkSpace's collaboration tools, the team enjoys seamless file sharing and real-time document collaboration, enhancing productivity and efficiency.



WHAT RIA WORKSPACE DID

AVOIDANCE OF VDI/CITRIX COMPLEXITY

- Opting against VDI and Citrix solutions, the client avoided the complexity, expense, and potential video/audio issues associated with these platforms.
- RIA WorkSpace provided a locally hosted solution, ensuring smooth and reliable operations without the need for complex infrastructure.



ENTERPRISE IT COMPLIANCE AND SECURITY FEATURES

- RIA WorkSpace supports IT compliance with enterprise IT standards, providing comprehensive security features tailored to the client's needs.
- Advanced security measures exceeded the client's expectations, providing peace of mind in a rapidly evolving digital landscape.

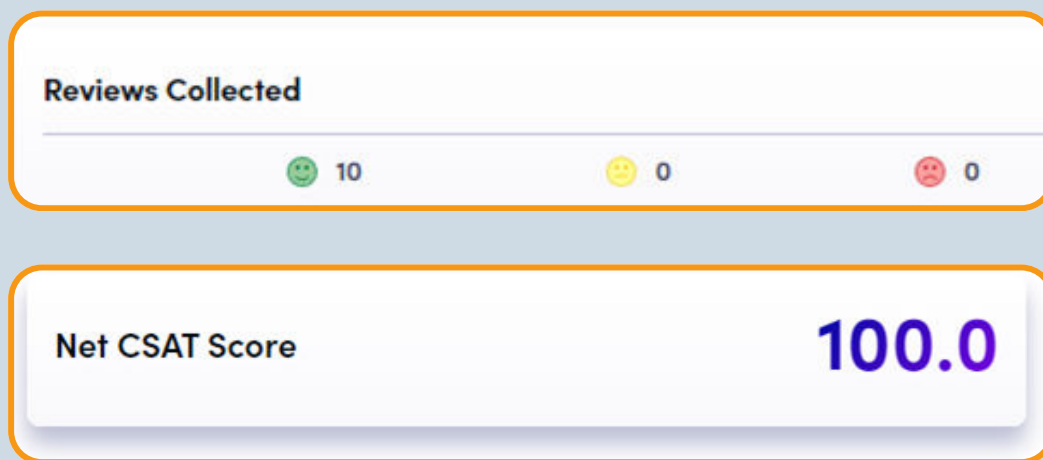
ROBUST PRODUCTIVITY AND SECURITY FEATURES:

- The client experienced an array of productivity and security features, surpassing those available at the larger RIA, thanks to RIA WorkSpace's tailored solutions.



A LOOK AT THEIR IT SUPPORT TODAY

Every IT request for support is entered into a ticketing system. When those tickets are resolved, our team requests feedback using a Smileback prompt. Here is a snapshot of their most recent 10 reviews:



"Sam was very helpful and patient as we had to have a back and forth with one of our vendors. Thanks Sam!"

"Great help as always! Thank you."

"Thanks Joe. Great work as always!"