

RESOLVING IT FRUSTRATIONS FOR A GROWING RIA

Case Study

Client Overview

Number of Employees: 6

Number of Locations: 1

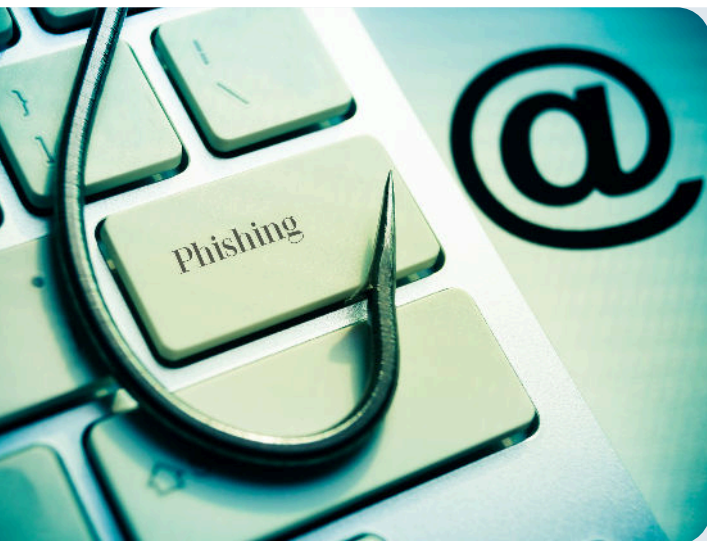
Biggest IT Challenges: Slow response times, phishing emails, physical server management, and unauthorized device purchases.

THE PROBLEM

Frustration was growing after this RIA's IT provider had been acquired by a larger company. Service quality declined dramatically and they felt their needs were being sidelined in favor of larger clients.

TERRIBLE SERVICE AND RESPONSE TIME

- "We don't want to call multiple times to fix the same thing."
- Day-to-day issues were often delayed, and critical problems didn't get the urgent attention they required.

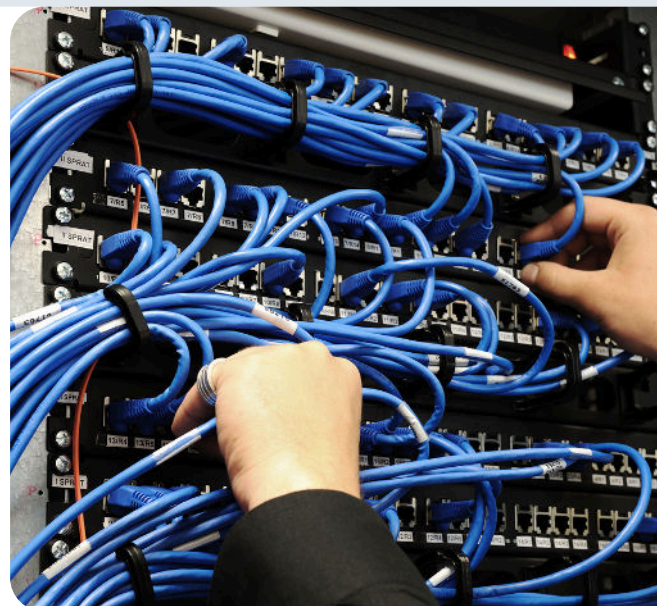


PHISHING EMAILS

- The firm received a large number of phishing emails in their inboxes. This was a persistent problem, causing significant security concerns for their team.

ONSITE SERVER MANAGEMENT

- This RIA still relied on a physical server, which was cumbersome and couldn't keep up with the standards of modern cloud-based solutions.



RIA WORKSPACE UNDERSTOOD THEIR CONCERNS

When we first spoke to this RIA, their concerns were consistent with those of other RIAs of the same size.

- They felt overlooked by an IT partner who prioritized larger clients
- They felt that their IT infrastructure wasn't meeting the needs of their hybrid office
- They wanted security issues (like phishing) to be resolved with best-in-class cybersecurity solutions
- They felt it was time to transition away from a physical server setup



OUR SOLUTION

RIA Workspace stepped in with a Managed IT solution that resolved all of their concerns.

Dedicated, Responsive Support

Like all RIA WorkSpace clients, this RIA has a dedicated support team, ensuring they had a direct point of contact who understood their business. This included an Onboarding Technician and a dedicated Primary Support Engineer who is always their first stop for any requests. All support tickets, from all clients – regardless of sized, are prioritized based on their urgency and each request has strict response and resolution timelines the team stands behind.

Enhanced Phishing Protection

Phishing had become a significant issue for a lot of businesses. The security services that are part of our Managed IT package includes comprehensive security measures, including employee training and advanced phishing filters, to mitigate these risks. Also keeping their RIA secure is a full, enterprise-level cybersecurity solution so they are not only protected, but IT compliant as well.

Transition to Cloud-Based Solutions

When they started working with us, this RIA relied on an outdated onsite server. We migrated them to a cloud-based system using Microsoft 365, ending the need for physical servers and allowing remote employees to access their files securely from anywhere.

THE RESULTS

Once onboarding was complete and this RIA was on the RIA WorkSpace platform, they saw immediate improvements.

- **Faster Response Times:** Day-to-day questions are resolved quickly, with no need for follow-ups or repeat calls.
- **Secure Operations:** Phishing incidents dropped significantly, giving the team peace of mind.
- **Streamlined Infrastructure:** Migration to the cloud has simplified file management, enhanced security, and supported their hybrid work model.

CSAT Reviews

[Open review stream](#)

Key Metrics | ☐ Benchmarks

Net CSAT Score

97.0

Response Rate ⓘ

61.5%

Surveys Viewed 109 Surveys Rated 67

Reviews Collected

67

😊 66 😐 0 😞 1

"Sam is such a pleasure to work with. I'm always appreciative of how thorough he is!"

"Sam was so persistent getting this set up. A pleasure as always."

"Great assistance and patience with me. thanks."