

Virtual IT Solutions Pay Big Dividends for Investment Firm

Strategic Planning, LLC relies on The Gatestone Group’s PowerPlay Virtual IT solution to monitor and protect their network, as well as Gatestone’s Back-up Disaster Recovery solution for improved and reliable back-ups.

Executive Summary
STRATEGIC PLANNING, LLC <ul style="list-style-type: none"> ✓ Financial Planning ✓ Columbus, Ohio, USA ✓ 5 Employees, 50 clients, over \$100 million in investments
BUSINESS CHALLENGE <ul style="list-style-type: none"> ✓ \$100 million in client investment, and strict compliance guidelines dictated a need for proactive monitoring and backup solutions.
NETWORK SOLUTION <ul style="list-style-type: none"> ✓ PowerPlay by Gatestone simplifies the monitoring process, while our BDR solution keeps client information safe.
BUSINESS RESULTS <ul style="list-style-type: none"> ✓ Compliance needs were met. ✓ Eliminated risk associated with tape backups ✓ Streamlined productivity delays due to program questions ✓ Forecasted need for network growth

Business Challenge

Strategic Planning is a financial planning/wealth management organization. The account managers handle investments including, mutual funds, stocks, life insurance policies, annuities fixed/variable and total estate planning.

Sean Edgell, a Strategic Planning employee and “go to guy” for a vast majority of network issues, outlines some of the problems they were trying to avoid as their company grew to over \$100 million in client investments.

Sean, having spent many years in the wealth management industry, knows that network reliability is a serious point of concern for potential clients. He wanted to move their lucrative company away from the traditional break-fix model. “Network outages are crippling, we couldn’t do anything, our client database is online, it makes our work go from time effective, to we lose money, we have to start doing things manually,” says Sean. Sean goes on to say “When our servers went out before, we were out for 5 business days, now we are anywhere from 3 to 10 times quicker.”

Another big area of concern for Sean and all of the Strategic Planning staff was the need for a reliable and safe back-up solution. Previous to the Gatestone solution, Strategic Planning was using a tape back-up solution. “An inconvenience more than anything else, and over time we started forgetting to take it home, we also only did our backups every 3 days,” says Sean, who also knew this was a source for security concern. According to the Gartner Group, the world’s leading information technology research and advisory company, tape back-ups fail 60% of the time. “It eliminates worry, before you didn’t know if the tape would jam.” With Gatestone’s BDR, not only is information backed up in real time, but it can be restored in the event of a server failure in 4 hours.

Network Solution

Sean’s first step was to address the network reliability concern. He hired John Frazier, with The Gatestone Group, to develop a solution that would address all of the business needs. The first step for John was moving forward to meet all compliance issues. “The smartest most efficient choice for Strategic Planning was our PowerPlay solution, this virtual IT service not only proactively handles all of their maintenance (i.e. patches, virus detection, etc.) but also forecasting future areas of concern,” says John.

PowerPlay is the virtual IT solution provided by Gatestone. PowerPlay, a comprehensive solution, provides 24x7 monitoring and support for all PC's and servers in a network as well as helpdesk support. This fixed-fee service is designed to proactively and regimentally maintain the most troublesome areas of desktop management such as virus problems, spyware issues and patching. It is performed as an unobtrusive background service. Included in this service is a monthly report that is sent directly to the end user. These reports outline CPU usage levels, memory available, cookies deleted, virus/spyware deleted, and how much space is being saved by deleting this information. "I like the reports for stability reasons. It's accurate too, we changed our memory and the next report showed the jump we made, and the best part is the memory update we needed was forecasted from previous reports."

The helpdesk goes beyond traditional break fix support by providing support for productivity issues such as Microsoft Office questions, Email set up issues, or VPN configurations. The helpdesk is located domestically in Pittsburgh, Pennsylvania. Our subscribers report zero communication barriers. "Sounds like the people are next door."

"We had a couple formula questions on excel, and it was taken care of. To be as efficient and effective as possible, that's why you use this stuff, if you want to sit on your hands and figure it out yourself, then you can do that, if you don't have the time, then this is perfect. There is no such thing as a dumb question, you could even use it as a tutorial if needed, and nobody in the office has to waste their time teaching other people."

-Sean Edgell, Strategic Planning

Lastly, John focused on the back-up situation. Knowing that tape was not the best solution for an investment firm handling personal information; he focused on virtual back-up options. John chose our SMB Backup Professional, a service designed to cut cost and risk for subscribers. This service virtualizes failed servers, this decreases downtime from days to hours and cuts risk substantially from the traditional tape back-up.

Business Result

Sean had become accustomed to the break-fix model and tedious, high maintenance tape back-ups. Instead of tracking down, and waiting for an IT professional, often times Sean is called proactively before he is even aware that there is an issue. With PowerPlay, and the SMB Backup Professional in place, he has developed a new idea of what efficient is. "When a network issue is detected, I get calls. It's night and day, we had to wait 3 days to a week the old way, I have received calls within an hour with this new model, we had a power glitch with the BDR and Judson (Gatestone Engineer) walked in and said turn on your BDR machine, I didn't even know it was out" says Sean.

"Compliance reasons dictate that we cannot be out, we have grown to trust Gatestone, and we are confident now. What costs more, this service or business down time?"

-Sean Edgell, Strategic Planning

"I would absolutely recommend this to anybody, there is no other way that you can truly say you are the most efficient and effective without using the whole program, including the BDR. You can optimize your practice, and when something goes wrong, you don't feel like you are stuck in the mud. It comes down to, do you want to optimize your business."

For More Information

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