

CASE STUDY

Migrating a Bank's Current IT Infrastructure and Securing Customer Data

BACKGROUND

Many small businesses do not have the resources or expertise required to effectively manage their IT needs. As a result, many look outside their organization for help in augmenting these services. However, the results from these types of partnerships can differ greatly. Many IT service firms operate as single person entities and thus are unable to address all the needs of a small organization in a constantly changing technical environment.



THE PROBLEM

When the new Chief Operating Officer took his position at the bank, he began to evaluate the current operations. Like with any mature organization, a fresh set of eyes or a new level of scrutiny can bring welcomed change. In the case of the bank's IT support, the COO had a number of concerns. First and foremost, support was handled by a one-man company.

Users argued that complaint resolution took an inordinate amount of time and that technical lapses were impacting overall productivity. When the COO analyzed the bank's security measures, he noticed several gaps in security and little attention was paid to the bank's critical technology infrastructure. When the board was presented with an initial report on the state of the bank's IT infrastructure, they demanded immediate action.

The bank contacted NetCenergy to perform an audit of the current situation.



THE SOLUTION

NetCenergy first sought to better understand the bank's business.

NetCenergy:

- Deployed a technical team member to conduct a full in-person assessment of the bank's technical systems and met with the bank's leaders to gain a complete understanding of their business goals and objectives
- Created a clear roadmap for how the organization was currently using technology, and how they would like to leverage it in the future
- Tailored a specific set of recommendations and an implementation plan that would ideally suit the needs of the bank, which included the level of investment required to upgrade the bank's current systems, which pieces of the bank's current system could remain intact, and the increased capabilities and security advantages of the proposed system
- Created a contingency plan considering the unlikely possibility that the current IT infrastructure vendor might not cooperate with the transition.

NetCenergy's comprehensive plan also provided detail on the different layers of IT infrastructure that would be implemented in order to ensure a successful program. NetCenergy stressed security, proactive monitoring, and user training as integral pieces to this new IT service program.



THE RESULTS

The bank's leadership team appreciated the business-first mentality that drove the recommendations, and was assured about the IT migration thanks to NetCenergy's contingency plan.

NetCenergy then conducted:

- A seamless transition of the bank's IT equipment and operations
- On-going security and fully monitored support under a fixed monthly fee agreement
- Capital budget planning assistance to help the bank plan for and understand its future technology needs
- Regularly scheduled security awareness trainings
- Quarterly business reviews to discuss business changes at the bank and draft IT budgets

The migration process went smoothly. Of the partnership with NetCenergy, the bank's leadership team said: "we now have peace of mind that our customer's data is fully secure, regularly monitored, and effectively managed." Since the migration, the NetCenergy team became fully integrated with the bank's team through regularly trainings and reviews. The partnership has helped the bank increase productivity and security for employees and customers alike.

ABOUT NETCENERGY

NetCenergy is comprised of a team of information technology professionals based in Cranston, Rhode Island and available to service the needs of businesses and organizations in Rhode Island, Massachusetts, and Connecticut. Founded on break/fix and project-driven solutions, we've evolved into a fully managed service provider, proactively monitoring and managing each client's infrastructure with the latest advancements in technology. Giving our clients reliable and consistent support, we offer solutions that are customizable and scalable to your industry and business needs, ensuring our clients get the most value out of their I.T. solutions. We design solutions for each client's future initiatives and long-term business goals.





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THE SOLUTION

Finally fed up with its previous vendor, the firm approached NetCenergy to design and implement a comprehensive I.T. support plan. NetCenergy's Managed Service Program, eNCompass, was the perfect solution. This custom-built support plan was designed specifically with the accounting firm's business and budget in mind and outlined how security, proactive monitoring, and training would be critical components of the new plan. This layered approach to I.T. offered a stark contrast to the firm's previous vendor, with a superior level of service and a business-first approach to I.T. program development.

Following initial approval, a NetCenergy engineer went on-site to audit the existing technological infrastructure and provide a contract with final recommendations and investment details. Once approved, members of the NetCenergy team proceeded to implement all the tools, processes, and services outlined in the custom designed eNCompass service plan.

The solution included:

- Email protection
- Business Continuity and Disaster Recovery (with annual DR test),
- 24X7X365 monitoring with remediation
- Regular business reviews
- On-demand reporting
- Anti-virus
- Web filtering security
- Regular end-user training

Ultimately, the program provided the firm with everything they needed to stay focused on improving profitability and protecting its investment in technology.



THE RESULTS

After NetCenergy's initial recommendations were implemented, the firm experienced an enhanced level of security and stability. Gone were the days of unpredictable and unreliable system performance.

Under the new plan, NetCenergy instituted the following:

- Reviews and optimizations of all desktop computers
- Installation of a new firewall
- Stabilization of the existing server
- Ongoing security and safety trainings
- Quarterly business reviews

These improvements helped ensure that the firm had the proper infrastructure in place to meet business needs and that all users were well equipped to face security threats with a new set of tools. Quarterly reviews also offered the client information regarding activity on its network and provided opportunities to discuss strategic I.T. questions around business changes and budgets for system improvement.

The team at the accounting firm felt the benefits of the new system and partnership with NetCenergy most strongly during tax season, a time that is typically stressful and challenging. Under a new I.T. system during tax season the client said: "In the past, we've had technological issues during tax season which can create undue stress in the midst of an already challenging time of year. This year, after having NetCenergy's eNCompass program in place, we have not had a single issue with our system or technological infrastructure." The client saw an increase in its bottom line because they were given an opportunity to focus on its business and productivity rather than on its I.T. systems.

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