

## CASE STUDY

# Marcum Technology Provides Strategic Planning, Remediation, Scalability, and Support Through Managed IT Services



## COMPANY OVERVIEW

Based in Maryland, this client of approximately 100 employees is a regional assurance, tax, and consulting firm providing services to businesses, government agencies, organizations, and individuals.



## THE CHALLENGE

A regional assurance, tax, and consulting firm outgrew their pay-as-you-go relationship with their IT consultant and needed an industry-specific managed services provider to stabilize, upgrade, and support their IT infrastructure to comply with government regulations, mitigate security risks, reliably support multiple locations, and scale to meet projected growth. Prior to Marcum Technology's involvement, the firm's IT infrastructure had been plagued by many technical challenges, including:

1. Misconfigured, outdated, and unpatched computers, servers, and network devices.
2. Improperly implemented (or maintained) industry-specific software.
3. No strategy plan to introduce newer technologies designed to help staff work more efficiently.
4. Network targeted by adware, spam, phishing schemes, and network intrusion attempts.
5. Slow and unreliable remote access performance.
6. Undocumented, untested, and unmonitored backup and disaster recovery plan.

## THE GOAL

The client's goal was to dramatically reduce the down time for its users during busy seasons. They wanted to upgrade and modernize their systems while preparing for future growth and expansions. They also needed the system to support flexible work hours and remote work. Additionally, the customer wanted more than reactive break fix support for its infrastructure and end user's systems. They required someone with knowledge of their many accounting programs.

## HOW WE HELPED!

First, Marcum Technology moved the existing on-prem infrastructure to a data center / co-location. We created point to point VPN to their offices. Then, we designed, procured, configured, and installed a new SAN and head-end servers. This solution offered greater redundancy, speed, and performance. We then built all new virtual machines, which included active directory, LOB application, SQL, Citrix, RDS, and web servers.

Once installation and testing was complete, we migrated the user's data to the new systems and worked with the end users to connect to the new Citrix environment. The improvements were noticeable instantly. Support calls were significantly reduced, and down time only occurred during scheduled maintenance windows.

With the infrastructure stable, we turned our focus towards additional scalability and security implementations such as changing active directory usernames, DUO MFA, AzureAD Hybrid Join, workstation encryption, wireless access points, Office 365 license changes, conditional access policies, spam filtering, security awareness training, conference room Teams/Zoom rooms, EDR, centralized password manager, security cameras, etc.

## MARCUM TECHNOLOGY CASE STUDY

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In addition to the systems overhaul, Marcum Technology provided help desk support. All technical issues are triaged through the help desk's ticketing system where we provide tiers 1 through 3 and senior engineering services. The ticketing system allows us to provide Services Level Agreements (SLAs) and other performance metrics. While most of the issues could be resolved remotely, the customer preferred having an IT presence at their offices, so we provided on-site support three days a week. Marcum Technology also held Quarterly Business Reviews (QBR's) to discuss the help desk performance, IT projects business goals, and new technology.

## THE SOLUTION

Marcum Technology worked with the client's leadership team to fully understand their business objectives and develop a realistic project plan that would not interfere with busy season or the client's ability to perform billable work throughout the year. With the plan in place, Marcum Technology stepped into action and:

- Designed, built, and installed the framework to migrate the client's on-premise network infrastructure to a new data center.
- Built frameworks to proactively monitor the condition of and automate the patching process of all computers, servers, and network devices.

- Facilitated the purchase and installation of new industry-specific audit and tax software.
- Developed an easy-to-follow technology roadmap for the firm's leadership to purchase and deploy vital equipment.
- Migrated the firm to Microsoft Office 365.
- Deployed enterprise-class antivirus/ransomware prevention frameworks and cloud-based spam-filtering technologies.
- Set up reliable CITRIX and VPN access for all users utilizing two-factor authentication for added security.
- Developed the plans and installed the frameworks for the firm's backup and disaster recovery solutions.

## MARCUM LLP AND MARCUM TECHNOLOGY SERVICES

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Following their transition to a stable and scalable IT platform, the firm enjoys better network performance, significantly less downtime, and fewer help desk requests, enabling them to service clients more efficiently and profitably.