



## ACCOUNTING FIRM IMPROVES PRODUCTIVITY AND EFFICIENCY WITH VIRTUAL TECHNOLOGY AND MANAGED IT SERVICES

### BACKGROUND

When it comes to accounting, taxes and payroll, Willis, Osmond, Beilstein certified public accountants have a strong history of expertise and experience. With 19 staff members including 10 CPAs, the firm specializes in helping clients reach their personal and business goals. CPAs undergo a rigorous examination to ensure their knowledge of accounting, tax, and auditing laws and are also reliant on software applications and technology to serve their clients.

### CHALLENGE

Tax season is the most productive time of year for most CPA firms and thorough preparation can lead to a successful season and satisfied clients. Operating on their own technology network and servers for many years, the firm wanted to ensure that they had the capacity necessary for peak seasons as well as security and backup systems in place to protect critical data.

“We wanted to minimize the risk of technology failure and secure our important data,” noted Earl Myer, Partner, Willis, Osmond, Beilstein.

### SOLUTION

Meridian Managed Technologies developed a plan to ensure the firm would have the right technology in place for optimum productivity and efficiency, particularly during peak times such as tax season. After reviewing the firm’s current and future needs, Meridian’s technology experts recommended ‘virtualizing’ the server environment. Five physical servers were combined into two servers that allow multiple applications to run simultaneously with improved performance. The virtualized server environment serves as one point for critical software applications to be installed—which allows for improved reliability for critical accounting applications.

Meridian’s NetworkGuardian™ plan was also put into place to provide Willis, Osmond & Beilstein with year around assurance that their technology needs are covered. The plan includes:

- Access to a vCIO (Virtual Chief Information Officer)
- Continuous network monitoring and issue remediation
- Regular network performance reviews in easy to understand language
- A scalable solution that grows with the business

### RESULTS

With the new virtual server solution, the firm is enjoying improved network reliability along with maximum access to critical business applications. Other benefits include lower hardware costs

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## RESULTS

and the ability to easily expand network capacity when it is needed. Also, fewer servers create a reduction in energy consumption which is an added benefit.

“Meridian took our network of five servers to just two to create an improved virtual system that provides us with optimum technology efficiency,” explained Myers.

Now, in the event of a server failure, the system automatically switches over to the other server, ensuring that critical business applications remain available during peak season. Meridian helped to optimize the firm’s server processing power, memory and storage which in turn improves system reliability and reduces risk of downtime.

“Meridian ensured we had the proper firewalls and security to protect our client’s data. We needed a backup system and someone to monitor our network and virtual server environment; and the NetworkGuardian™ plan provides that for us.” noted Myers.

“We get top service from the Meridian team. There is always someone we can talk to and they get us the right answers in short order. I would definitely recommend Meridian to other businesses for their technology needs,” said Myers.