

Connected Office for **FINANCIAL SERVICES** Successes



Financial Services Highlights

Connected Office services appeal to the vast majority of SMBs from 5 to 100 users that are reliant on technology to operate their day-to-day business. Reliance is usually determined by the amount of corporate data they compile, collaborate and communicate via a network and/or the Internet. Financial services firms rely heavily on technology, and now, on The Utility Company.

Patton, Albertson & Miller

The Situation

Patton Albertson & Miller is a wealth management firm headquartered in Macon, Georgia with offices in Atlanta and Winston-Salem, North Carolina. The firm provides comprehensive financial management advisory services for high net-worth clients throughout the United States. Patton operates in a very competitive marketplace and high quality service differentiates the firm from its competitors. Their reputation depends upon effective communication, both with clients and fellow team members.

A reliable IT infrastructure was very important to the firm's future success but growth to three geographically separate offices was straining their IT resources. Furthermore, regulatory compliance was more challenging, particularly with regard to data privacy and email retention.

The Solution

Enter The Utility Company who quickly took command; placing all employees under Connected Office Managed packages in all three of their offices (Macon, Atlanta and Winston-Salem, North Carolina), migrating all email from an overtaxed Exchange server to Hosted Exchange solution and transitioning their archival company to a new secure one – saving them money and ensuring their compliance, which in turn helps ensure Patton's reputation.

Jimmy Patton, Managing Principal and CEO commented "I couldn't be more pleased with our decision to move to a more proactive IT solution. The Utility Company isn't just here to react and fix our problems. They take a full solution approach to our entire business and look at how we use IT now, and how we should use it in the future. This is the IT solution I have been looking for!"

Accounts Recovery, Inc.

The Situation

ARI, a financial services company in Brunswick Georgia, has a heavy reliance on data for day-to-day operations. Over the past 4 years they have grown steadily requiring constant upgrades to their network and servers to accommodate client requests. Finally when their system backups began failing, ARI felt the need for change and looked to The Utility Company to take control of their full IT infrastructure in a complete managed Connected Office service plan.

Accounts Recovery, Inc.

The Solution

Under the new package, Accounts Recovery can now concentrate on their tasks at hand instead of wasting their time 'fighting fires' on a daily basis. With continuous monitoring of their infrastructure and support for even their remote users, ARI trusts The Utility Company to keep their operations running efficiently.

Lori Garza, partner at ARI, has nothing but praise for the 1-866-My-Utility Live Helpdesk offered as part of her managed Connected Office service. "Since moving to proactive support, we've called the helpdesk several times and always received a prompt solution to whatever issue we've had. It's like having an IT support person on staff except it's even more convenient. There is no waiting whatsoever and are always available".

The Golden Bear Mortgage Company

The Situation

In the financial services industry, particularly the mortgage industry, valued customers looking to buy their dream home expect timely responses to enquiries. **The Golden Bear Mortgage Company**, of Folsom California, had been working with another IT service provider for the past ten years. Like most seemingly captive small businesses they "took their advice and paid whatever they asked for" despite the fact the provider would simply "show up to their office twice a month, work on their computers, upload all updates and then charge them about \$1,100.00 per month."

When Golden Bear's server started to have problems they were told that it was time to purchase a new one. They received a quote for over \$15,000.00 to replace and reconfigure their system. Since they had bought two HP 4345 Multi-Function copiers from Western Blue (the Utility Service Provider of Sacramento) earlier in the year their President and owner, Chris Long, decided to see if Western Blue could help them out with their problem. "I felt \$15,000 was enough for me to get a second opinion", stated Long.

The Solution

"After coming in they kept us up and running while they figured out that I didn't need a new server. I just needed to host Exchange off-site. This has proven to be a big savings for us. All my updates are done at night, if there is a problem a tech shows up right 'out of the blue'. Generally we don't even know about the problem. I feel now that I have essentially received two copiers free. At this current time I am spending under \$1,100.00 per month and receiving more service than ever."

Utility's View

"The traditional break-fix model is how 90% of today's small and medium-sized businesses consume technology, mainly because most people don't know our level of service exists. Unfortunately, the old model is about businesses paying a service provider or technician to put them back where they were yesterday," stated **Mark Scott**, President of The Utility Company. "Our model focuses on providing businesses with the ability to stabilize IT operations and budget while improving predictability and utilization - any new investments in technology are geared toward expanding revenues and streamlining business processes and costs."

About The Utility Company

The Utility Company® is a leading provider of virtual IT service and support for small and medium-sized businesses, delivering the required hardware, software and service for a monthly fixed fee per user.

Our Connected Office® service program provides a single point of contact to deliver and manage technology, communications and vertical line of business applications – **95% Remote; 100% Proactive.**

Customers are supported by local Utility Service Providers delivering on-site service and business-technology consulting to reduce spending and increase utilization – our Beyond Managed Services® franchise opportunity is available by prospectus only.

Learn how to make technology work for your business today at theutilitycompany.com