Ntiva

Managed IT, Security, & Cloud Services

Chicago MSP Helps Financial Firm Succeed with Hosted Cloud

FINANCIAL SERVICES FIRM

THE CHALLENGE

Move to Chicago Inspires Move to Cloud Technology Services

Two days before James Yount, President and Senior Managing Director at Destra Capital Investments LLC ("Destra Capital"), was about to move the investment firm from Lisle to Chicago, he discovered a startling revelation: there would be no room for the company's server in the new shared office space.

Destra Capital had wanted to move to the cloud, but the management team never imagined such an abbreviated timetable for migration. In addition, the new building prevented the company from using a firewall. For a financial firm, this is simply unacceptable.

The four-year-old firm always had servers on-site and a full-time staff member for IT infrastructure management. This business model, and its lack of comprehensive IT support, led to lots of break/fix situations.

The move to Wacker Drive made them rethink everything, as the company did an about-face on their technology strategy. "We wanted to move to a managed service provider (MSP) that could handle all our services from the IT standpoint," Yount said. "We wanted to outsource it."

Destra Capital has specific regulatory compliance requirements from the SEC and FINRA to keep data safe, to manage continuous backups, and specific protocol for QuickBooks. The latter must be accessed from several different people at different locations at different times.

> "Their help desk is very responsive ... they worked their tails off to get us moved to the cloud in a timely manner. We were under the gun. They came up with a great solution, quickly."
>
> — James Yount, President and Senior Managing Director, Destra Capital

"From my external staff's perspective," said Yount, "we wanted it to be seamless." Great IT service companies know how to both meet these requirements and provide service offerings to help a business thrive.

THE SOLUTION

The Freedom of Managed Cloud IT Services

According to Yount, Ntiva came up with a good solution in a short period of time: move to a fully hosted cloud solution using thin client technology, dumb terminals with a monitor, mouse, and a small box that Yount describes as "the size of two glass cases with a couple ports on the back."

Unlike PCs, which are full functioning machines, thin terminals don't have a CPU to process information. Destra Capital's entire network—data, email and applications—are accessed in the cloud via an Internet connection. Ntiva also provided the firm with the necessary cloud security to keep their data safe.

All (of our) people are doing their jobs without any servers or desktops in our office," said Yount. "They can connect to the desktop on phones, Androids, laptops, anything. I have external salespeople who can now log on remotely and receive security updates."

THE IMPACT

Improved Collaboration, Security, Backup and Disaster Recovery

Going fully cloud based was not Destra Capital's first plan. However, with the sudden restrictions, it made sense. Traditional tasks like printing, email, word documents and data backup are all routed through the server in the cloud.

You don't have to worry about a computer getting stolen, a hard drive crashing or losing your information now," explained Yount. "With the thin clients we don't need laptops or desktops anymore."

Departments like accounting, legal, compliance, product and marketing all have secure access to the server. At this time, Destra Capital has chosen not to equip their 10 outside sales professionals with thin clients since this group already has laptops and less need to access the network.

Collaboration ranks high on Yount's list of benefits for cloud computing. Thanks to Microsoft Teams, "Our marketing department can work on documents, and somebody else can review them and store them in folders in the cloud. It's a great opportunity for other industries as well, who deal in complexity, numbers, and require remote collaboration."

"We are not going to look for a different solution—this is a permanent solution for us. It's easy to not have the servers anymore and have Ntiva monitor our systems and manage backup."

Those backup services include disaster recovery, which can literally save your business.

[Backup and disaster recovery](#) can be a massive source of stress for any business owner. Ntiva's off-site data storage ensures that, even in the event of a natural disaster, your data will never be lost.

"Being a small company and having a bigger company like Ntiva, who provides us with our outsourced IT, was a great find," said Yount decisively. "[Their help desk](#) is very responsive … they worked their tails off to get us moved to the cloud in a timely manner. We were under the gun. They came up with a great solution, quickly."

Ready to harness the power of digital transformation? Set up an exploratory call to see how Ntiva's IT consulting services can help you meet your business needs.

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