Case Study

Quality financial advice
Whitehill Keir

WHITEHILL KEIR
Chartered Accountants & Advisors

For Brisbane based accounting firm Whitehill Keir, reliable IT systems and proactive support are vital in providing the professional services that help their customers achieve their financial goals.

The Challenge

Whitehill Keir are passionate about partnering with their clients to build and protect their financial wellbeing. They were looking to simplify their IT environment and gain access to better support for their team.

Philip Keir, Director said, 'We were moving our practice management and other systems to the cloud and needed someone with the right expertise. The solution we had was more suited to maintaining older legacy systems and less focused on where we saw our future.'

With limited internal resources to manage their IT, they decided they needed a partner that shared their vision and could provide a complete and local support solution.

The Solution

TechPath conducted a comprehensive assessment of systems and developed a solution that would support Whitehill Keir's day-to-day operations, along with their short and long-term business goals.

The cloud migration involved moving applications from a co-location setting to a much more simplified Microsoft 365 environment, providing flexibility and greater security for data and files. A per user per month Managed IT agreement now supports their systems and all of their IT needs. With a predictable technology budget, fixed-price proactive support, and reliable systems, they can get on with their day knowing their IT is in safe hands.

Philip offered this advice for others looking to make changes to their IT arrangements. 'If you plan to do away with having your own server, the impact of this decision needs to consider how any legacy software will operate and what support you will need in your new environment.'

The Outcome

Whitehill Keir now experience smoother business operations, can access a team of friendly and experienced technicians whenever they are needed, and have an IT partner that supports their future vision.

'The managed support agreement we have with TechPath has reduced the internal resources we require for IT that can take away from our key function which is to provide advice and support to our business clients.'

When asked why TechPath was selected, Philip said, 'We felt that TechPath demonstrated a good understanding of our needs and had the capability to implement the changes we needed. We also felt that it was essential that there would be proactive support and not just someone to call when things are not working.'

He added, 'Ongoing account management and IT consultation help us to maintain our goals and keep us going in the right direction.'