

DOCUMENT MANAGEMENT FIRM

By Mark Nelson and Pete Borchers

INFRASTRUCTURE EXPERTISE AND RESPONSIVE MANAGED SERVICES HELP ESTABLISH A NEW OFFICE AND A FOUNDATION FOR FUTURE GROWTH.

THE CLIENT.

The client provides an innovative document management and archive service for high-net-worth individuals and families—enabling them to preserve and share financial and legal information and legacy items.

FULL RESPONSIBILITY FOR IT INFRASTRUCTURE.

This document management firm sought a managed services provider to step in and assume responsibility for all aspects of its IT infrastructure. Because the firm's previous provider was slow to respond to requests, it wanted a Chicago-based partner that could be available to assist employees when needed and that could resolve problems quickly—if not immediately.

In particular, the firm looked for a provider that could:

- ◆ Schedule regular office visits, but also respond quickly “on call” when needed.
- ◆ Assume responsibility for all IT roles from internal personnel.
- ◆ Create and update documentation and inventory regularly.
- ◆ Facilitate an office move, including selecting the Internet services provider, vendors, and equipment, setting up office hardware and the network, implementing the IT infrastructure, migrating user profiles to a new domain, and training users.
- ◆ Work with technology end users of levels of experience.

The firm chose West Monroe Partners as its managed services partner. West Monroe Partners demonstrated extensive knowledge and experience with providing managed IT services, as well as the ability to lead the firm's upcoming office move. In addition, West Monroe Partners was familiar with the firm's product and operating environment from having led the development of its commercial document management solution.

A STABLE, RELIABLE, PRODUCTIVE IT ENVIRONMENT.

West Monroe Partners began by assessing the client's IT infrastructure—both to familiarize its team with the firm's infrastructure and so that it could begin resolving pending issues. Then, West Monroe Partners took over all IT support, including creating and updating documentation, preparing an inventory of hardware and software, and providing proactive maintenance.

After resolving pending issues, West Monroe Partners developed short- and long-term recommendations and began working on the most immediate priorities:

- ◆ Setting up the new office space, including configuring all ports on the floor, creating a wireless access point, configuring the domain controller, connecting laptops to the domain, migrating user profiles, and working with the phone company to implement a new VoIP system.
- ◆ Selecting a new Internet services provider that could offer the client's desired upload and download speeds.
- ◆ Adjusting back-up plans to include all files that the company would need to recover in event of a disaster.
- ◆ Applying encryption to all computers to elevate security and protect sensitive information stored on laptops.
- ◆ Implementing RADIUS authentication to enable secure access to the network from outside the office.
- ◆ Installing and configuring JIRA, a new development ticket tracking database.
- ◆ Converting Excel hardware/software inventory to an Access database to enable the client to run reports and manage its inventory more carefully.
- ◆ Providing recommendations for reducing costs.

By working with West Monroe Partners to manage its office move and its IT infrastructure, the document management firm now has a stable, reliable, productive work environment—one that provides a high degree of business continuity and a foundation for future growth.

West Monroe Partners is an international, full-service business and technology consulting firm focused on guiding organizations through projects that fundamentally transform their business. With the experience to create the most ambitious visions as well as the skills to implement the smallest details of our clients' most critical projects, West Monroe Partners is a proven provider of growth and efficiency to large enterprises, as well as more nimble middle-market organizations. Our more than 300 consulting professionals drive better business results by harnessing our collective experience across a range of industries, serving clients out of offices across the United States and Canada.