

CASE STUDY

Small Firm Escapes 45-Minute Login Nightmares and Toxic IT Contracts



FIRM SNAPSHOT



Glen Omanson

- **Firm:** United Team Tax
- **Owner:** Glen Omanson
- **Location:** Palm Beach County, Florida
- **Staff:** 2-3 tax preparers (fluctuates seasonally)
- **Services:** Tax preparation
- **Software:** Drake Tax, Google Drive integration
- **Previous Setup:** In-office Dell PC acting as server, expensive local IT company with admin control
- **Years with Verito:** 3+
- **Discovery Source:** NATP webinar

THE CHALLENGE

Glen Omanson left a large firm to start his own practice. At the big firm, remote access was a disaster.

"I was spending **three to four times a week, 45 minutes to an hour, just to get logged into their server**. And then it was a closed box. So I couldn't access my files when I was in that program."

He escalated to compliance. He ran it by management. No one had solutions. "I kept going up and they're just like, they had no solution for me. And so that was when it was like, well, **this doesn't work. If I can't work here, then we got to go do something else.**"

On his own, Glen set up a basic Dell PC as an in-office server. It worked - if you were physically in the office. "You could only work on the Drake software if you were in the office. Or you'd have to put a file on a USB drive and take it home to work on that same file."

He hired a local IT company from his previous firm. They weren't cheap, but at least they were familiar. The problem? **They controlled everything.** "They were the administrator. So as much as I don't have a technological background, I don't want to have anything to do with tech anymore - **it's not fun when you're trying to get into your own computer and you're locked out.**"

Glen spent hours on Google chat figuring out workarounds. "There were some things that took four hours just to resolve. But it was free my time and I got to learn how to do some stuff that ultimately made our life easier."

But he knew this wasn't sustainable. His small firm didn't need someone coming to the office. They needed cloud access and flexibility without vendor lock-in or annual contracts.

WHY VERITO

Glen discovered Verito through an **NATP webinar**. "That initial webinar put you guys on my radar."

He looked at one other cloud provider but liked Verito's structure better. "What I liked about Verito was it sounds like you have everything I would ever need, but the way it's priced and the way I can access the services is **more a la carte.**"

For a small business changing every year different staff, different return volumes, different work locations **flexibility was everything.** "I liked how I could sign up for three users and then literally next month I could sign up a fourth user, and in three months I could drop that fourth user. So **I'm not getting stuck with an annual billing** when I may not need that capability."

AT A GLANCE

FIRM SNAPSHOT

- **Name:** Glen Omanson
- **Staff:** 2-3 tax preparers (fluctuates seasonally)
- **Services:** Tax preparation
- **Software:** Drake Tax, Google Drive integration

THE CHALLENGE

- At his old firm, remote access was unreliable logging in took nearly an hour multiple times a week.
- His local IT setup worked only in-office and left him locked out of his own systems.
- He needed a flexible, cloud-based solution without in-person IT visits or restrictive contracts.

WHY VERITO

- Glen discovered Verito through an NATP webinar and was drawn to its flexible, a la carte structure.
- Verito's month-to-month user model fit his changing team size without annual contracts.
- Transparent, low-commitment pricing let him start small and scale confidently after past bad experiences.

AT A GLANCE

THE SWITCH

- Glen started small with two users, then scaled to three or four within a month. The onboarding was straightforward no vendor lock-in, no surprises, no hidden annual commitments.

THE RESULTS

- Glen now works seamlessly from anywhere no more USB drives or office restrictions.
- Verito's support is fast, patient, and resolves even tricky issues like Google Drive mapping.
- Flexible month-to-month setup fits his evolving firm, and he actively recommends Verito to peers.

Pricing mattered too. "I was able to get started with you guys at a smaller segment—probably paying for two users. And within a month, I was probably paying for three or four. But **it was nice to be able to try it out, not lay out a ton of money up front, not be locked into an annual contract.**"

He'd been burned before. "I've had so many problems with companies that even told me it wasn't an annual contract. And then in two months when I'm trying to cancel, they're trying to hit me for the full fee."

THE SWITCH

Glen started small with two users, then scaled to three or four within a month. The onboarding was straightforward no vendor lock-in, no surprises, no hidden annual commitments.

THE RESULTS

Glen now works primarily from home. "I can log in anywhere. If I'm in the office, I log in on the computer there. And if I'm at home, I'm working from my home computer setup."

No more USB drives. No more being tied to the office. No more 45-minute login nightmares. "I don't know why anybody would stay in the setup that I had previously if they got to experience being on your server for a month even."

Support resolves issues without drama. When Google Drive mapping got confused between his drive and his brother's, the team stuck with it. "It definitely took some time maybe 30 or 45 minutes but that's quick enough, and **they got it fixed.** That's something where maybe it's not even really in your guys' purview, but I greatly appreciate the fact that **they were patient and willing enough to work through it.**"

Phone support is immediate. "I call in, **I always get someone right away.** I've always had my issues resolved if I had any."

The flexibility works exactly as advertised. His business changes year over year different personnel, different return volumes, different work arrangements. "Your guys' setup sounded a lot more flexible. And **being able to just turn it on and turn it off has been really nice.**"

He's already referred an accountant in Arizona to Verito. "I refer you guys whenever I have the chance. **I'm very happy.**"

Compared to his previous experiences at large firms with dedicated IT departments and compliance teams, Verito is **"a very easy to work in system compared to what I've seen in the past."**



THE BOTTOM LINE

Glen went from 45-minute login nightmares at a large firm and expensive locked-down IT contracts at his own practice to **flexible, month-to-month cloud infrastructure that actually works.**

"I haven't had any of those issues. It's been great."

Want similar results? Learn how Verito delivers flexible cloud hosting without vendor lock-in or annual contracts perfect for small firms that need to scale up and down.

AT A GLANCE

THE BOTTOM LINE

- Glen replaced frustrating, time-consuming logins and rigid IT setups with Verito's flexible cloud hosting.
- Month-to-month pricing lets his firm scale users up or down easily no contracts or lock-in.
- He's experienced zero major issues since switching: "It's been great."

