

CASE STUDY

Tax and Accounting Firm Moves to Verito Private Cloud to Better Support Clients



FIRM SNAPSHOT

- **Name:** Tammy Wendland
- **Software Hosted:**
 - ProSeries
 - Quickbooks
 - Office Tools
 - Adobe Acrobat Pro

Verito Private Cloud helped Palm Tree Consulting, LLC improve customer services by handling complex IT needs and providing seamless work from any location.

BACKGROUND

Palm Tree Consulting, LLC, is a full-service tax and accounting business in Olathe, Kansas, focused on serving individual and small business clients with bookkeeping, sales, tax, payroll processing, and tax preparation.

CHALLENGES

Tammy was handling her own technology needs until the demand of managing multiple users on multiple programs across multiple workstations became too much for her to handle on her own. They hired a consultant to help manage the network and fix issues, but she says, "I always had to be on the phone with him while he fixed it because he wasn't familiar enough with my setup. And he was also unfamiliar with all the programs I use, so I often had to call support on those programs myself. I also did not like having the responsibility for back-ups and physically storing my data on-site."

She was paying for outsourced IT but ended up having to do a large portion of the work herself, pulling her away from working with her clients on their tax and accounting needs.

SOLUTION

Tammy knew what she needed from a Cloud Provider: customer service that understood her business needs and was available when she needed them, regular backups of her business-critical data, and speed.

Verito's expert technicians provided a solution that was faster and more affordable than the competition. Verito's turn-key Tax and Accounting solution was a perfect fit for her software needs: ProSeries, QuickBooks Pro, Office Tools, and Adobe. Verito Cloud is backed by its Certified Pro team and their extensive experience hosting and maintaining accounting-specific applications and software.

AT A GLANCE

BACKGROUND

- Full-Service Tax and Accounting Firm based in Olathe, Kansas.
- Focus on bookkeeping, sales, tax, payroll processing, and tax preparation.

CHALLENGES

- Hired an IT consultant to help with IT needs.
- IT consultant proved to be ineffective because of the lack of knowledge of Tammy's specific applications.
- Tammy ended up needing to be involved with almost every IT issue because of this lack of knowledge.

SOLUTION

- Verito's Turn-Key Tax and Accounting Solution perfectly met her software needs.
- Tammy chose Verito for their extensive accounting-specific application hosting and software knowledge and experience.

Tammy says, "Verito manages my servers and sets up my users. They also take regular backups of data and store it. They are always available when I have an issue. I chose Verito because they are familiar with programs used by accounting and tax professionals, and I felt their pricing was fair."

THE RESULTS

Verito worked directly with Tammy throughout the entire migration process, from initial application/licensing set up to seamless data migration to their private cloud over a weekend. Tammy says, "Having someone to call that can help solve my technology issues is the most helpful." Tammy has been able to grow her business since switching to Verito because she no longer needs to worry about IT and can focus on her core business. Verito's team of expert engineers is available 24/7/365 for technical support if any issue arises.

One feature of Verito that Tammy loves is the ability to add employees to her server quickly. She says, "One other benefit I have found in using your service is how easy it is to onboard new employees. All I have to do is provide you their information. Verito completes the setup and has a call with them to make sure everything is working. Very fast and easy on my end."

Their customer service and satisfaction have been improved from enhanced mobility, which allows users to work from any location with the same capacity as working from their office. Their employees can now be in contact with their clients and provide excellent customer service even outside of normal operating hours from their mobile devices or any computer.

AT A GLANCE

- Verito's automated enterprise grade daily backups were a key selling point for Tammy.
- Verito's 24/7/365 Customer Support was an essential feature

RESULTS

- Tammy has grown her core business since switching to Verito because she no longer needs to worry about IT.
- Increased customer service and satisfaction due to enhanced mobility and connectivity.
- Tammy loves that she is able to quickly and easily add new employees with a few simple steps.



I would recommend Verito for someone searching for a cloud provider. Their response time is excellent, the staff is always helpful and follows up, and my computer is available from anywhere I am.

Tammy Wendland
Palm Tree Consulting

WHY HOST WITH VERITO?

Dedicated Private Server: Host all your applications on a fully customizable, dedicated server. We offer dedicated servers to ensure the highest performance standards for our clients.

World-Class Security: We protect your applications and data with best in class security protocols, adhering to SOC2 and PCI-Compliance standards.

100% Tax and Accounting Pro Focused: We focus exclusively on accounting and tax software. Our expert support team is highly knowledgeable in all kinds of accounting and tax applications.

24/7/365 Technical Support: Our Microsoft Certified Professionals are available 24/7/365 for any support needs. 100% Customer satisfaction is our number one goal.

Daily Automated Backups: Our automated enterprise-grade daily backups ensure peace of mind. Never worry about data loss again.

Savings: Verito is more cost-effective than trying to manage on-premise networking with offsite backup yourself, with no up-front cost or monthly contract.

Business Continuity and Disaster Recovery: Our automated daily backups ensure business continuity and disaster recovery.

Seamless App and Add-on Integration: Our certified professionals are knowledgeable in all kinds of applications and add-ons. We are happy to assist with any integrations.

SLA-Backed 99.995% Uptime Guarantee: Our Data Centers, strategically located in Tier 4 locations, ensure maximum uptime with geographically disparate locations and data redundancy.

Scalable Resources and Plans: Pay only for the resources you use. Quickly scale up your resources for tax season with our no-contract plans and scale down when needed. No hidden fees to change plans.

Real-time Collaboration: Our platform provides real-time collaboration for any application on any device. Work seamlessly anywhere, anytime.