MANAGED TECHNOLOGY PARTNER

The Conservation Fund

THE CONSERVATION FUND

OSibeyond
CASE STUDY

TCF Aligns Technology with Business Objectives by Partnering with OSIbeyond

TCF aligned its IT operations with the organization's business objectives by engaging with **OSIbeyond** as a Managed Technology Partner. The IT leadership at TCF understood that a complete overhaul of IT operations was necessary to meet the organization's business objectives. With a small internal IT team TCF has limited capacity and resources, and required assistance to help develop strategy and move projects forward. To address this, TCF sought out a technology partner that could provide both guidance and practical expertise in implementing appropriate technology solutions. Upon engaging with OSIbeyond an in-depth Technology Assessment was conducted. As a result, TCF realized several key benefits:

1. Established a technology roadmap for the organization, including prioritized recommendations that considered the investments TCF had already made
2. Enhanced IT operations and services and the elimination of underutilized or redundant systems
3. Implemented new technology solutions based on current best practices

"It's been fantastic, enterprise-class support, and professional on every level. I can tell the systems they have in place for managing IT operations are world-class. They have solid methods to solving problems and just great in dealing with people."
- David Williams, Director Technology Operations, TCF

About TCF
The Conservation Fund (TCF) addresses the question of how to blend a capitalist society and the conservation challenges in America that calls out for innovative and enduring solutions. TCF provides the capital to finance conservation, and ensures that the economic fabrics of communities are thoroughly woven into in the process.

TCF makes conservation work for America. By creating solutions that make environmental and economic sense, TCF redefines conservation to demonstrate its essential role in our future prosperity. Top-ranked for efficiency and effectiveness, TCF has worked in all 50 states to protect more than 7.8 million acres of land since 1985.

Lack of Quality Support & Complicated Infrastructure Caused Challenges for TCF

Prior to engaging with OSIbeyond, TCF utilized a managed services provider for IT support operations. However, the quality of service was not to the standards expected by TCF. In addition, TCF's infrastructure was primarily on premise and overly complicated. TCF required an in-depth review of their technology operations along with recommendations for solutions that strategically align with the organization's objectives.

"We started noticing service issues with our previous provider. Help desk calls would be sent to voicemail, they were inconsistent about getting back to us on certain issues, and we felt as if we had to go back through their work to double check it."
- David Williams, Director Technology Operations, TCF

Decision to Partner with OSIbeyond

TCF was introduced to OSIbeyond through another organization. During initial discussions TCF stated their desired vision for technology, and requested OSIbeyond to provide guidance on technology direction.

"My initial meetings with OSI's leadership were great. They gave me the sense that they were the kind of provider to give us personalized service. They seemed very accessible, but also very knowledgeable in both technology as well as the general needs a business has."
- David Williams, Director Technology Operations, TCF

The Solution Provided by OSIbeyond

OSIbeyond conducted an in-depth Technology Assessment of TCF's environment. The report provided TCF with a strategic technology roadmap to address key elements including:

• Reducing the organization's dependence of on-premise infrastructure
• Implementing a modern backup and disaster recovery solution
• Expanding the use of cloud-based platforms
• Streamlining IT support operations

"The assessment was great! Before signing with OSI, we had them conduct an evaluation of our network and make some suggestions. That report was very fundamental for us and has become a roadmap for where we wanted our technology to go. OSI did a great job putting that together. It was delivered on schedule and exactly what we wanted."
- David Williams, Director Technology Operations, TCF

One of the key components of the Technology Assessment addressed ways that TCF could reduce their on-premise technology footprint and streamline access to IT systems.

"Some of the recommendations in the technology assessment have helped us change how we operate. For example, we used a Citrix environment for such a long time but it was a nightmare to manage. Transitioning to Remote Desktop Services was a major step for us. It's provided a ton more stability just in terms of making our network and applications accessible to staff. We don't get phone calls on support for RDS, whereas Citrix use to be our second largest area of support. This has simplified our environment and allowed us to have better customer focus and have more time in our day to think critically of where we want our organization to go."
- David Williams, Director Technology Operations, TCF

The Experience Partnering with OSIbeyond

During the onboarding process, OSIbeyond meticulously documented the TCF environment and ensured proper security measures were in place.

"I think OSI's CTO helped with that himself. He was very engaged from the beginning. It was great to see someone at his level diving in and helping out with the day to day because he wanted to make sure he knew enough about the environment and wanted to make sure it went smooth. I can't think of a single issue we had."
- David Williams, Director Technology Operations, TCF

On an ongoing basis, OSIbeyond has been providing TCF with high-level support and engineering resources, who oversees the day to day administration of the TCF environment as well as implementing new solutions.

"We started working with two engineers on a number of different items. They have been fantastic. Every project they've worked on has been done very well, quickly, and professionally. Most importantly they give us options when we work with them. They give us a choice in solutions, and provide recommendations on what they think is the best path forward."
- David Williams, Director Technology Operations, TCF

Benefits of Strategic Partnership with OSIbeyond

OSIbeyond provides TCF with continuous recommendations through scheduled quarterly strategic calls with OSIbeyond's CTO.

"The quarterly calls are fantastic. It's good to spend a little time talking with OSIbeyond's CTO, just about the kind of things he sees on the horizon or what other customers are doing and what OSI is working on internally. It's good to have that strategic call to get updates, recommendations from OSI, and tapping into an outside perspective to make sure we're doing everything we can be doing."
- David Williams, Director Technology Operations, TCF

As a Managed Technology Partner, OSIbeyond's objective is to alleviate technology burdens to allow organizations to focus on better serving their staff, members, and mission.

"It has taken the majority of the systems admin role out of my day to day. That lets me think more about the strategy and direction we want to go. We know should there ever be turn over in our organization that we have a partner to lean on whether it's for helpdesk or sys admin that can help us get over that gap."
- David Williams, Director Technology Operations, TCF

TCF states the single most important reason they would recommend other organizations to partner with OSIbeyond, is because of the quality of service.

"If I had to pick one factor, it would have to be the service. They have fantastic service on all levels of the organization. I would recommend OSI because it's a really well run operation and they follow-up on problems, they're forward thinking, and they do a really great job at general customer service and are accessible and personal. I feel like I can pick up the phone at any time and speak to their CTO or CEO, or anyone else I've worked with at OSI."
- David Williams, Director Technology Operations, TCF

Learn More About Partnering with OSIbeyond
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