

Case Study

# Atlanta Consulting Group

How OS33's customer service excellence enabled a smooth  
breakaway transition for Atlanta Consulting Group

workplace  
by OS33

ACG Atlanta Consulting Group

## A Smooth Move

Atlanta Consulting Group, a registered investment advisor (RIA) to institutional clients and family offices, throughout the United States, broke away from its parent company Raymond James in January 2018 to become an independent firm. While excited to embark on this new adventure, the group knew that the move was going to be a big undertaking.

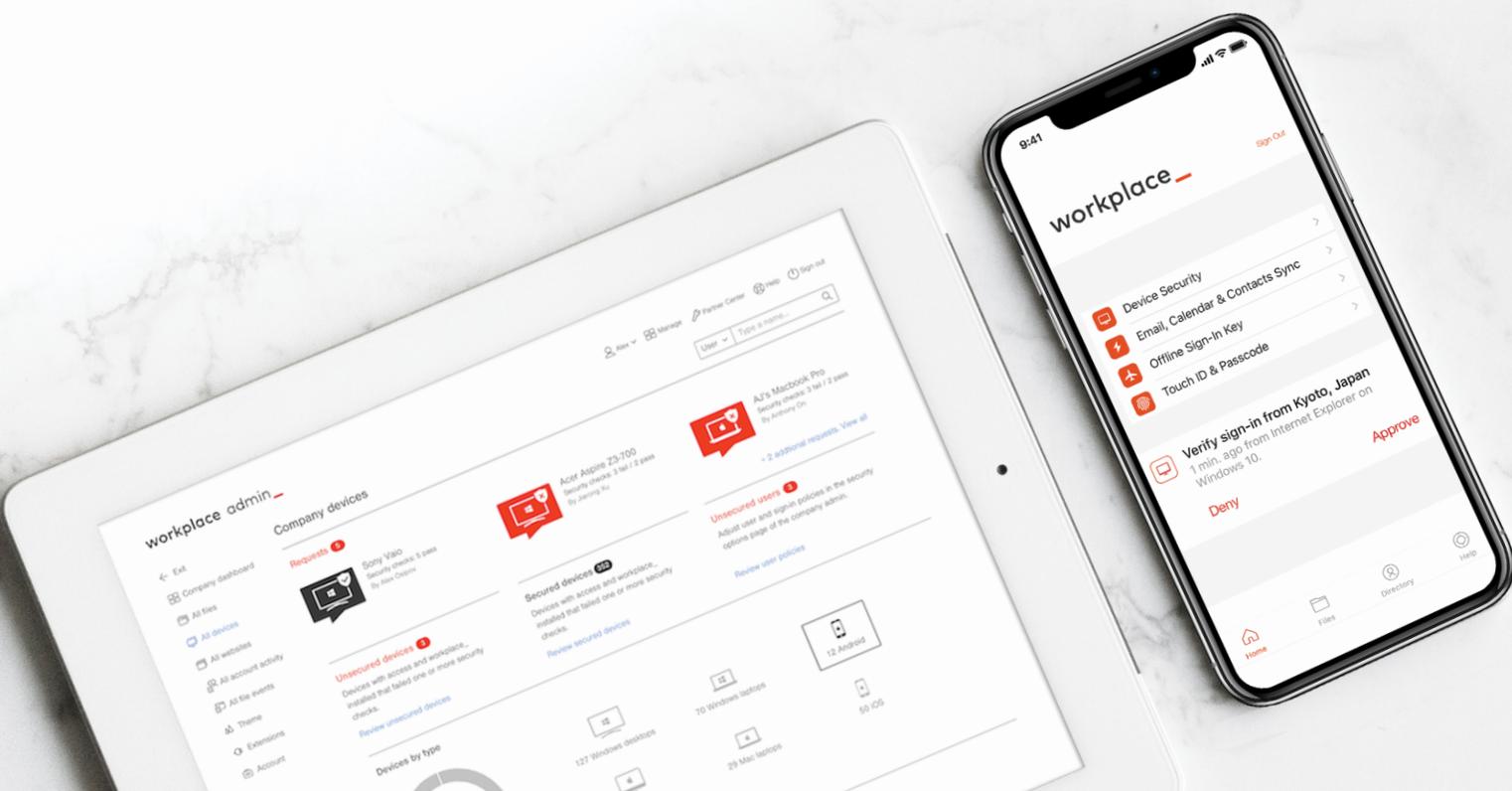
"We are financial consultants by trade, not a technology company, so we wanted to find a firm that could handle all our IT needs during the process," said Gary Schafer, COO at Atlanta Consulting Group. As such, the advisor turned to Workplace by OS33 to fulfill all of its security, compliance, and productivity enablement needs.

**"We couldn't be happier with the decision we made," said Schafer. "The OS33 team succeeded 100 percent in fulfilling all our demands."**

## The Search

Atlanta Consulting Group began the search for a technology partner by interviewing half a dozen platform vendors, based locally in Atlanta as well as out of state. Initially, the group believed that using an Atlanta-based company would be ideal because their staff would be available to come onsite, if there were any issues or problems. "However, we soon realized that 99 percent of what we do can be done remotely, and since we decided to go with a cloud-based product, there was no need to have the vendor based here in Atlanta," Schafer said.

As the firm narrowed down its search, it soon became clear that Workplace was the best option available. The cloud-based platform not only provided the firm with the top-notch security and compliance features it was looking for, but it also offered the wealth manager's team the ability to access the platform from any computer or mobile device, anywhere, simply with an Internet connection. It was the main selling point for the Atlanta group.



# The Implementation Process

Atlanta Consulting Group was impressed, not just with the functionality that Workplace offered, but also with the customer service the group experienced during the implementation process and beyond.

The entire process was completed in a matter of months, from start to finish. It began with a few preliminary calls between Schafer and OS33's Team Lead of Deployments, Peter Dzurina. Those initial calls then turned into weekly calls as the process got under way and until the set up was complete and the Workplace platform went live. "Peter and I talked on the phone all the time," recalls Schafer. "He really spent the time to learn the nuances of our group and how we used files. He was instrumental in getting us converted and he worked hard to make the overall transition particularly phenomenal," he said.

One area, in particular, that the Atlanta Consulting Group team had been concerned about when implementing the platform was the ability to safeguard the integrity of their files and to make sure that none of their files would get lost.

"We had data dating back to inception of group in 1985, so over 30 years worth of data, and we couldn't stand to lose any of it," Schafer said.

"There were some nuances involved in getting the data transferred from our previous company, Raymond James, but Peter worked diligently to make sure we didn't miss a beat," said Schafer. "We didn't lose any data and the whole process was seamless."

Another part of the transition involved migrating the group's email data over. The OS33 team worked closely with the IT team at Raymond James to figure out the best solution. "When they said, 'no we can't do it a certain way, Peter got on the phone with them, and talked through different options and scenarios to make it work. The whole process really worked flawlessly, and we were extremely happy," Schafer noted.

Next to join the implementation process was Samantha Resposo, Tier 1 Support Agent at OS33. She visited Atlanta and stayed onsite for the first week, working closely with Dzurina to collectively complete the process and address any problems or concerns. Next, Robert Matalon, Customer Success Manager, paid a visit to the group in Atlanta. He met with each employee at their workstation to see how they were adapting to the Workplace platform and to address any issues that any users may have been experiencing. "He was very helpful to people and showed them different tips and tricks for using the Workplace platform, and even gave them his ideas for taking advantage of all the features the platform offers," Schafer said.

Early on, the staff had to adjust to using a new operating system, but once they became comfortable working with the Workplace platform and started using the applications in the hosted environment, they became more confident with it. After the implementation was complete, Matalon also held conference calls every couple weeks to check in and see if anyone had any issues or questions that needed to be addressed.

"The whole implementation process was great, and now that the system is up and running, the staff couldn't be more pleased with it," said Schafer.

## Ongoing Customer Service

Post-implementation, the Atlanta Consulting Group advisors are continuing to learn about a variety of new tools and features that make the platform invaluable to their team. They remain just as pleased with the customer service that OS33 continues to provide. The customer support desk is available 24/7 - 365 days a year, and Schafer describes the OS33 support team as being "extremely helpful and responsive." He notes, "We never had issue that they couldn't resolve in a timely manner; we love it."

The wealth manager also appreciates the level of attention it continues to receive from OS33. "We may be a small client for them, but we always feel like we are an important client," Schafer noted. "Whether it was pre-implementation or post-implementation the level of support and service we have gotten to date has been superb."

## Mobility Makes a Difference

Many of Atlanta Consulting Groups' advisors and consultants spend much time travelling throughout the US and abroad to meet with clients. "The technology we had been using previously was functional, but it was not fast or cutting edge, and not designed for mobile use," said Schafer. "It was hard to get access to the files and programs they needed to use." For instance, many of the advisors use a program called Morningstar Direct, which is installed at each user's workstation. Prior to moving to the Workplace platform, an employee had to physically be in office if they wanted to use the program. That is no longer the case. Now, all of the firm's employees work from the Workplace platform, so they are able to log directly into the program through the Workplace environment, from anywhere, and work remotely. "We did not have this ability in the past and it has increased productivity since the user does not have to be in the physical office to use the program," said Schafer. "It is yet another way that using Workplace has improved our productivity."

"The mobility the platform provides has also been extremely important to the consultants in our office who travel a lot," said Schafer. "Now, when they go to meetings they don't have to tote these humungous files around with them in a suitcase. As long as they have an iPad and Internet connection, they can log in and pull up everything they need online," said Schafer. The advisors can log in and run reports on the Workplace platform from home, at work or on the road. "It's just so much more efficient and affective and the ease of being able to access those files is amazing," he said.

In fact, all of Atlanta Consulting Group's employees are enjoying the mobility of the platform, because it allows them to work from home when necessary or even log in during vacation, if need be.

"It's one thing they have been really excited about, because now they don't have to be chained to their desk to do their work. It's all at their fingertips," Schafer said.

"The OS33 team were able to put a variety of applications into the Workplace environment that made for easy remote or mobile computing, and their installations were flawless," Schafer said.

## Why the Cloud?

When setting up its independent shop, Atlanta Consulting Group briefly considered using the same type of server-based data storage system used by its previous company. The group quickly determined, however, that the time was right to make the move to a cloud-based storage system. "We wanted a system that fell in line with the new ways that data storage is now being achieved, on a cloud-based program," said Schafer. "Everything is headed in that direction, so we decided to make the move."

Today, the Workplace platform provides the Atlanta Consulting Group with easy access to applications and files that are backed up and protected in a hosted environment. The cloud-based servers have the ability to keep data up and running and secure under one roof, so the RIA doesn't have to worry about information being lost if a laptop is stolen, or if an employee inadvertently saves a file to a local drive or a desktop that is not secure. For Atlanta Consulting Group, moving from a hosted server to a cloud-based product made the most sense from a security standpoint. "Our information is likely to be more secure now than when it was on hosted on a server in our office," said Schafer.

Another feature of the Workplace platform that the Atlanta Consulting Group is finding immensely helpful is the way it works with the Outlook email system, to archive old emails in the cloud. "This used to be a pain point for us," Schafer said. Previously, the team had to work with small email mailboxes that were constantly sending alerts that users' inboxes were full.

"Now, on the Workplace environment users can store as many old emails as need be. "The system works flawlessly; far better than anything we have had in the past," Schafer said.

## Working in the RIA space

Workplace was built to work with wealth managers, and this was another key selling point for the Atlanta Consulting Group. "Partnering with OS33 provided us with a level of service that a vendor who doesn't specialize in RIAs can't provide," Schafer noted.

"The OS33 team has a deep knowledge of the RIA space in terms of technology and compliance, and that gave us confidence that if we do have to go through an audit process, from an IT point of view, their system will make it as easy as possible for us," he said.

## Security Matters

Securing data and client information has become a huge concern in almost every industry across the board. "Security is paramount nowadays, and being able to tell if we are using devices that do not meet compliance requirements is another extremely important feature that the Workplace platform provides," Schafer noted. To that end, the wealth manager uses the two-factor authentication system that the Workplace platform offers as an extra layer of security. "The other day we had someone that tried to access our firewall by mistake, and I got an email about it from Workplace," Schafer said.

"You hear about data breaches constantly on the news, so we feel very secure having the Workplace security program in place,"

"All in all, I can only sing the praises of the OS33 team. I would recommend the Workplace platform to anyone in the RIA space," Schafer concluded.

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