

## INDUSTRY: Finances

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### the CHALLENGE:

#### Move to Chicago Inspires Move to Cloud

Two days before President and Senior Managing Director was about to move the investment firm from Lisle to Chicago, he discovered a startling revelation: there would be no room for the company's server in the new shared office space.

They had wanted to move to the cloud, but the management team never imagined such an abbreviated timetable for migration. In addition, the new building prevented the company from using a firewall.

The four-year-old financial firm had always had servers on-site and a full-time staff member to manage technology. The move to Wacker Drive made them rethink both as the company did an about-face on their technology strategy. "We wanted to move to a company that could handle all our services from the IT standpoint," he said. "We wanted to outsource it."

They had specific requirements from the SEC and FINRA to keep data safe, to manage continuous backups, and specific protocol for QuickBooks. The latter must be accessed from several different people at different locations at different times. "From my external staff's perspective," he said, "we wanted it to be seamless."

### the SOLUTION:

#### The Freedom of Full-Cloud

According to him, 3Points came up with a good solution in a short period of time: move to the full-cloud using thin client technology, dumb terminals with a monitor screen, mouse, and a small box that he describes as "the size of two glass cases with a couple ports on the back." Unlike PCs, which are full functioning machines, thin terminals don't have a CPU to process information. Their entire network—data, email and applications—are accessed in the cloud via an Internet connection. 3Points also provided remote access to Microsoft 8.1.

"All (of our) people are doing their jobs without any servers or desktops in our office," he said. "They can connect to the desktop on phones, Androids, laptops, anything. I have external sales people who can now log on remotely and receive security updates."

Going full-cloud was not their first plan. However, with the sudden restrictions, it made sense. Traditional tasks like printing, email, word documents and data backup are all routed through the server in the cloud.

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CASE STUDY

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“You don’t have to worry about a computer getting stolen, a hard drive crashing or losing your information now,” he explained. “With the thin clients we don’t need laptops or desktops anymore.”

Departments like accounting, legal, compliance, product and marketing all have secure access to the server. At this time, he has chosen not to equip their 10 outside sales professionals with thin clients since this group already has laptops and less need to access the network.

Collaboration ranks high on his list of benefits for full-cloud. “Our marketing department can work on documents, and somebody else can review them and store them in folders in the cloud. It’s a great opportunity for other industries, as well who deal in complexity, numbers, and require remote collaboration. We are not going to look for a different solution—this (full-cloud) is a permanent solution for us. It’s easy to not have the servers anymore and have 3Points monitor our systems and manage backup.”

“Being a small company and having a bigger company like 3Points, who provides us with our outsourced IT, was a great find,” he said decisively. “They are very responsive ... they worked their tails off to get us moved to the cloud in a timely manner. We were under the gun. They came up with a great solution, quickly.”

### SNAPSHOT OF CLIENT

**3Points Delivers:** Migration to full-cloud, thin client technology, virtualization of on-premise server, QuickBooks reinstallation, Windows 8.1, the Pure Monitoring Setup.

**3Points Client Since:** November 2014

**Industry:** Financial

**What They Do:** Work with advisors to build portfolios and manage wealth.

**Employees in the office:** 11, including executives, asset managers and staff members  
**Outside Sales Professionals:** 10

**Year Founded:** 2011

**Location:** Chicago, Illinois

**Motto:** Experience rises above the noise™