

### **Company Profile:**

Medium size Insurance Agency located in Central Florida. Total of 20+ people operating from a primary office, and a secondary office in another market.

### **Existing environment configuration & challenges:**

Network connectivity issues at both offices made for unreliable access to cloud-based Agency CRM software, generating excessive downtime and loss of productivity. Individual user email accounts were not actively being backed up. Email data files were not encrypted and therefore not secure.

### **Project Description:**

After considerable growth over the last few years, the cloud-based agency management system in place had become increasingly expensive for the per-user Software as a Service (SaaS) licensing. Agency owners made the determination they could realize considerable cost savings and increase system reliability by converting to another industry Contact Resources Management (CRM) solution and bringing it in-house to be hosted on a local server.

### **Scope of Project:**

#### Phase 1: Pre-migration environment preparation

- Troubleshoot and resolve Network connectivity issues in both locations.
- Connect two office locations onto one network through a secure VPN.
- Implement high capacity multi-channel wireless solution at second office location.

#### Phase 2: Server deployment and CRM migration

- Procure and configure new server hardware suitable for locally hosting Agency Management Software, Microsoft Exchange for email, as a domain controller and printer and file sharing.
- Migration of all of the agency customer data and policy information from cloud-based Insurance CRM to new Agency CRM hosted locally on newly acquired server.
- Retrieve and consolidate individual POP3, IMAP and MAPI email accounts from user desktops & laptops on to local Exchange server.
- Clean, optimize, and secure all company issued desktops and laptops to be joined to the domain.
- Deploy *Platinum 24x7 Proactive Management* software bundle and remote access management tools onto server and all end-user desktops and laptops.
- Implement Platinum's *SMART Enterprise Backup and Disaster Recovery* solution to provide onsite redundancy for business continuity, and off-site data storage to ensure disaster recovery.

#### Phase 3:

- On-going proactive management of all server and desktop hardware, installed software, email, and services to ensure reliability and high availability of network resources and company assets.
- Bundled solution set deployed as part of Platinum's *24x7 Proactive Management* includes the following utilities and benefits:
  - 24x7 Network Monitoring
  - Business Class anti-virus
  - Anti-spyware
  - Web filtering
  - LogMeIn Pro
  - Patch Management