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October 2016

Precision Financial Turns to 365 Data Centers for Cloud Migration and Security

When Precision Financial decided to make their team mobile, they not only needed top-notch security, but a quick, orchestrated migration that would ensure a seamless transition to the cloud.

THE CHALLENGE

Precision Financial needed to migrate their business to the cloud for a more agile future.

Precision Financial, a 50-year-old multi-generational registered investment advisor based in New Jersey, manages assets for more than 400 families. As times have changed, and business has grown, Precision's IT infrastructure was in need of an update.

"We needed to allow our people to be more mobile as we added additional locations around the country," says David Vollmer, Precision Financial's Chief Operating Officer. "We needed to be more nimble."

Because their on-premise equipment kept them tied to one location, Precision needed an IT company that could give them a fresh look at their options. They put together an RFP, but were disappointed by the responses.

"Most came back nearly identical. It was all cookie-cutter. They didn't come up with a solution for us; they gave their solution for everyone, as opposed to finding out what we really needed," says Vollmer.

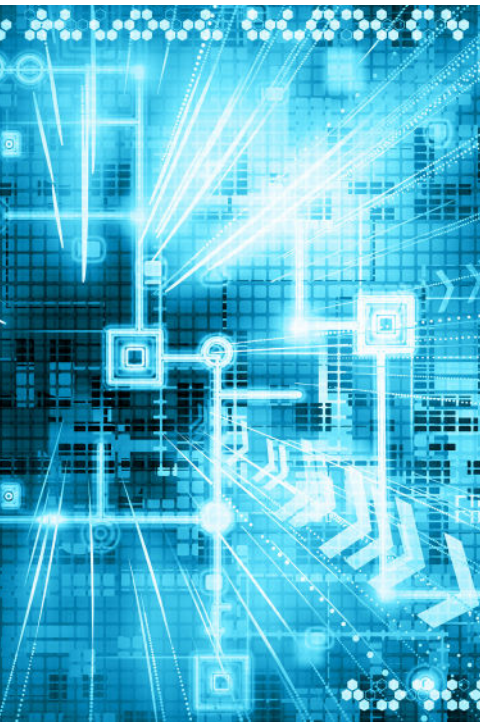
Then came with an offer of solutions not being advised by other firms.

"They took more time to ask about what our business model looked like, what

"Other companies tried to sell us on what they do. 365 Data Centers really listened and figured out a solution custom to us."

Dave Vollmer, Chief Operating Officer at Precision Financial

365 DataCenters
Technology Humanized™



our growth plans looked like, and what our security concerns and access needed to look like. They actually offered, as we sat and talked about solutions, reasonable costs above and beyond what we were originally looking for, which was great."

Precision Financial had big growth aspirations. 365 Data Centers was ready to get them there.

WHY 365 DATA CENTERS?

365 Data Centers seamlessly migrated three separate locations to the cloud.

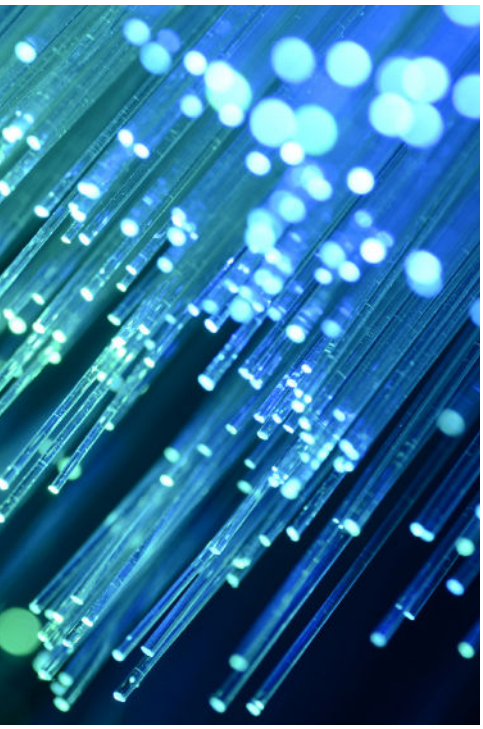
With data protection top of mind, 365 had to make sure Precision Financial employees had the proper levels of data security as they migrated to the cloud. They worked through equipment specifications, disaster recovery sizing, management of regulatory compliance, and the management of data security and applications. They even performed equipment reviews to make sure everything was working together in the right ways.

"They were patient with us. We needed to make sure security was taken care of, that the data was secured, that we were prepared for all three offices to be transitioned at once, and that we had people on site for those things. A small data breach could kill a firm like ours. [365 Data Centers] was really, really thorough and complete. They gave us enough assurance to be able to let go a bit."

On the day Precision Financial was to go live with their cloud deployment, 365 Data Centers ran a back-up, migrated it over, and rolled it out.

"Everybody logged in, and it was exactly as it was before."

Precision Financial's new cloud infrastructure was up and running—without a single glitch.



THE RESULTS

With immediate access to important information, Precision's salesforce can access client information and answer questions on demand.

Precision Financial employees now have a static IP address for their laptops—opening specific ports for each machine—as well as dual authentication, changing how they're able to service customers.

"Before, if somebody wanted to login to the network, there were heavy limitations. Employees were using VPNs to get in. It was bulky. It was slow."

Now, with all the necessary security in place, 365's cloud migration has enabled Precision employees to immediately access secure servers. Tablets in place of PCs have made Precision's teams completely mobile. Eventually, everyone will be able to work from wherever they are. Additionally, Vollmer is no longer managing IT, giving him more time to focus on his duties as Chief Operating Officer.

"If one of our servers needs to be replaced or is aging, 365 Data Centers is going to do that behind the scenes, and we're not going to have to worry about it. 365 has given us time to get back to doing what we're supposed to be doing."

To find out how 365 Data Centers' integrated IT infrastructure services can support your business initiatives, contact our sales team today.

Email: sales@365datacenters.com | Office: 366-365-6246 | Visit Us: 365datacenters.com

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