

Company profile

**Company: Roorda,
Piquet, and Bessee /
iFinancial**

Website:

www.rpbcpa.com

Country or Region:

Riverside, Ca

Industry: Certified Public
Accountants

Software and Services:

- DataGuard
Advanced
- XenApp and
XenServer
- ProActive IT
Services
- Microsoft
ResponsePoint
Phone System

A Prestigious CPA Firm Stops Worrying and Goes ProActive

"Our backup and data recovery we have in place is mind years beyond anything we've ever had in the history of our company. **We feel so much more secure now knowing we have local backup and remote backup and a server ready to virtualize those backup images and get us up and running in short time.**"

-Marcus Piquet, Owner of Roorda, Piquet and Bessee CPAs, Riverside, Ca



Company profile

Roorda, Piquet & Bessee, Inc., CPAs is committed to the success of their clients. They make it their business to know their clients' businesses well enough to improve their tax position, capital position, business structure and benefits packages, acquisition potential, and much more. RPB earns their fees by adding value to clients' companies and to their asset base.

RPB has learned a great deal since they began in this business, and are ready to apply this knowledge to enhance their clients' growth and success. They pride themselves on being able to conquer all of the intricacies of doing business in today's fast-paced economy.

Business situation

Prior to meeting Forum Info Tech, Roorda, Piquet, and Bessee went through some IT Support pains that they expressed to us.

"It's a long and painful story", begins Marcus Piquet, owner of RPB, "but we caught onto the idea of Managed IT services about 2 years ago. We were at an awkward size where it didn't make sense for me to continue to support all of our users individually and we were looking for someone who could do that for us, but we weren't big enough to hire a full time IT department though."

Unfortunately their first two attempts at Managed Services didn't work out as planned...



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"Our first attempt at managed IT services sounded great, they had a great sales pitch, and spoke about their operations center in Denver and all these different locations they have.. It turns out it was a two man show, just a franchise of another big company. He didn't have anywhere near the support and simply wasn't able to deal with the problems that we have at our site so we moved on from him."

"The next company that we tried, we made sure they were local and had some depth. I asked for resumes from all their engineers and interviewed them personally to make sure they had the expertise that I thought we needed. While their end user support was sufficient, their backend network, infrastructure, server etc, were very rigid. It turned out they were really just relying on one engineer who told everybody what to do. **We spent months back and forth trying to find a reliable remote back up solution and disaster recovery solution..** They were throwing out numbers like 30-40 thousand for it and were totally unrealistic. Our budget was irrelevant to them."

Solution

Roorda, Piquet, and Bessee found Forum Info Tech while Forum was installing Microsoft's ResponsePoint Phone System, and Forum mentioned that they also offer Managed IT Services. Did he know about this service?

Naturally, Marcus responded, "Boy do I ever! Don't say those words to me!"

After a lot of discussion and some trials, (remember, they had been burned twice!) RPB engaged Forum Info Tech to perform a complicated server migration from Small Business Server 2003 to 2008 which also involved a separate new SQL Model Server that involved a physical to virtual infrastructure.

"If they could do that competently and to our satisfaction within budget, time, and money we agreed to give them a shot for managed IT services. That process went really well."

RPB quickly signed up for Forum Info Tech's ProActive IT management service.

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"On the managed it services side I've been very pleased because they've been able to provide very good support on the backend to our servers. **Our backup and data recovery we have in place is mind years beyond anything we've ever had in the history of our company.** We feel so much more secure now knowing we have local backup and remote backup and a server ready to virtualize those backup images and get us up and running in short time."

They even put Forum Info Tech to the test-

"We've done fire drill where we take down our main domain controller and sent that into a virtual environment, in an hour or so we were fully up and running. They've proven the technology works, and we're very excited about that. "

Forum Info Tech has continually helped RPB throughout their time as a Forum client:

"Forum Info Tech is pretty visionary as far as IT firms go because they are looking down the road at what we can do in the future to provide better infrastructure with Citrix based products. They're not locked into one solution, one provider. **They're looking for the best solutions for our business.** They've taken the time to get to know our company, we meet with them frequently, and they take time to talk about it and develop a good relationship which is **exactly what we were looking for in an Managed IT provider.**

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