

# PROFESSIONAL FINANCIAL SERVICES USE CASE



## CLIENT OVERVIEW:

The company, a professional financial services firm has provided a variety of accountancy and business advisory services for clients throughout Canada since 1969. Industry clients range from manufacturing, importing/wholesaling, professional management and professional firms to land development and not-for-profit. Their philosophy is simple - offering trustworthy, expert resources to provide a balanced accounting service optimised for virtually any type of business.

## CHALLENGE:

The firm was due to upgrade its aging IT infrastructure so it was looking to move to a Cloud-hosted environment that supported Citrix and eight other key software applications. Further to application hosting, the firm client wanted the solution to accommodate seasonal usage of the hosted applications. Every year it required the immediate scale of desktops and thin clients during tax season. Currently, it was paying for technology year round it was only using 3 to 4 months of the year, during tax season. The firm was also exploring the benefits of working with a company that could help them at all levels, from help desk to infrastructure support. Evaluating multiple proposals, Microsoft Azure and Amazon Web Services scenarios were considered, in upgrading their infrastructure environment.

## APPROACH:

Third Octet follows a proven six step methodology approach to determine the best solution for implementation and end user managed services, if required, for our clients. In addition, Third Octet has a unique Collaborative Cloud Services approach that leverages teams of Azure solution experts from both Microsoft and Ingram Micro to help design an optimal solution.





## DEFINE

Build the business case by creating a high-level roadmap, prioritizing activities and estimating requirements:



## ASSESS

Key business drivers are rated so that work effort can be prioritized accordingly. In addition, the current environment is reviewed for potential problems and to identify user cases for the project. This information is used to set the direction of the deployment, upgrade, or expansion.



## DESIGN

Define architecture required to satisfy key business drivers and success criteria identified during the assess phase.



## DEPLOY

During the deploy phase, the infrastructure is installed and configured based on the design delivered.



## MONITOR

Define architectural and operational processes required to maintain the production environment, including informal and formal training.



## MANAGE

Partake in day-to-day or escalated services agreements to continue with the success of the delivered infrastructure.

# SOLUTION:

Determining that Amazon Web Services was too complex for the firm's needs, Third Octet leveraged a team of Azure solution experts from both Microsoft and Ingram Micro to assist with developing a solution to support a base of 70 users. Collaboratively, teams reviewed the fluctuating size of the workforce, specific applications and data resources required, and then designed a solution to ensure optimal functionality and end user experience. The solution is based on a paid user base, or true consumption based billing model, accommodating forecastable and predictable increases in users required during the high volume tax season. Forecasting true consumption enables the firm to move the data center to an operational expense. Another key criterion required is ensuring there are no service disruptions to users during the high volume tax season. The hosting platform is hosted entirely in Microsoft Azure, specifically the Canada Central region. VPN connectivity is established between Canada Center virtual networks and the firm's head office. The datacenter is locally present with worldwide redundant capabilities ensuring there will be no downtime during the high volume season. Third Octet's Collaborative Services capability provides support for our client at all levels.

# RESULTS:



The Third Octet Collaborative Cloud solution enables the firm to effortlessly scale their environment to accommodate work flow demand within any hour and only pay for true consumption, for forecastable and predictable fixed costs. The flexibility of the infrastructure implementation enables the firm to retract deployment even more quickly as tax season winds down. Application and infrastructure maintenance and management by Third Octet ensure optimal functionality and user experience so work flow productivity is uninterrupted and security levels are uncompromised.