



Rubiconn

Customer Solution Case Study



Overview

Country or Region: United States

Industry: Professional Accounting Services

Customer Profile

Daniel M. Kavanaugh CPA provides accounting services, tax preparation and financial planning to the medical/dental, warehousing and construction industries

Business Situation

Daniel M. Kavanaugh CPA needed reliable and secure email services and data access from anywhere with an internet connection

Solution

Daniel M. Kavanaugh CPA solved their unreliable service issues by choosing to host their network environment with Rubiconn "Private Cloud" Services.

Benefits

*Consistent, stable performance of hardware systems. Security of data. Increased performance for a lower cost.

*All services are included for One Flat Fee. Finally able to budget for IT expenses without the need to maintain antiquated hardware and software systems.

Financial Company shines through the Rubiconn Private Cloud

Daniel M. Kavanaugh's CPA firm is able to collaborate with clients in real-time with Rubiconn Cloud Services

"They immediately solved my IT issues, where other companies could not. They have streamlined my operations due to their wealth of technology based intelligence that will carry over into the future."

Daniel M. Kavanaugh, CPA

Daniel M. Kavanaugh CPA is a full service accounting firm serving small to medium size businesses primarily on the west coast. For the last 29 years, he has been providing accounting, tax preparation and financial planning services to various different industries such as medical, dental, warehousing and construction.

Dan's company is totally paperless. He is using technology to his advantage to provide services that are beyond the scope of most accounting firms. But Dan needed a solution that would provide secure, reliable and timely delivery of email correspondence and "anywhere access" to customer accounting data.

"We also provide outsourced bookkeeping services. We host our clients accounting system in a secure environment so that their financial data is updated and accurate 24/7," says Dan Kavanaugh. "My clients scan and email all of their bills, payroll, deposits and sales invoices to my paperless server, thus moving our clients to a paperless environment as well. We process the information immediately so the client can see daily the financial position of their company in real time, anywhere in the world with an internet connection. They can see the profit they made yesterday, last week, last month, last year etc.

This allows them to see what they have done well and not so well. It also allows them the ability to do what they do well and not spend time doing bookkeeping, thus focusing on profit generation. We act almost as their company's Chief Financial Officer."

“I have used Rubiconn, LLC as my IT consulting company for my CPA practice and out-sourced internet based bookkeeping company. When I first engaged them, they immediately solved my IT issues, where other companies could not. They have streamlined my operations due to their wealth of technology based intelligence that will carry over into the future.”

*Dan Kavanaugh, Owner and CPA
Daniel M. Kavanaugh CPA & MedAccount
Services*

When Dan Kavanaugh contacted Rubiconn, he was having email delivery and syncing issues with his smart phone.

Like many other small business owners, Dan relied on a trusted, yet overworked “one man shop” that was often not available to solve his IT needs. Rubiconn suggested that Dan subscribe to their hosted Microsoft Exchange Service and Blackberry Enterprise Server to secure and centralize his email, scheduling, and contacts, providing real-time delivery and syncing of correspondence and appointments.

Rubiconn suggested that Dan eliminate storing all of his data on local file shares on his office computer and subscribe to the Rubiconn Private Cloud thru a hosted virtual server. By moving messaging and collaboration software and data to the Internet “cloud,” Dan cut IT maintenance costs while improving overall network and desktop performance.

Discontinuing saving all data on one office computer also helped Dan to eliminate the worries about catastrophic system failure and theft. Having Rubiconn host the infrastructure also eliminated worries about downtime, and employees can be more productive by accessing data online, anytime, from anywhere.

Not long after partnering with Rubiconn to solve his email issues and data issues, Dan came to Rubiconn with another business challenge.

As a CPA, Dan Kavanaugh must acquire a great deal of information from his clients. He found that he spent a lot of time chasing both people and paper. Dan also found that he and his staff often could not access their client’s data when they needed to due to the data being in use already, or it was not available for remote access, or the QuickBooks application wouldn’t be working. They needed a solution that would allow the client site as well as the CPA firm to access and edit data at the same time. They needed the QuickBooks application to be hosted on a reliable network source that was indeed available when they needed to access the application.

Rubiconn suggested that Dan Kavanaugh’s clients migrate their accounting data to the Rubiconn Private Cloud also. Rubiconn provides Application Hosting for a multitude of accounting and professional services applications.

By migrating the client’s accounting data, this solved the repetitive issue of the data not being available when needed. There was now “one-stop shopping” to access applications such as QuickBooks.

Accounting Data was now available to both the CPA and the client—at the same time! It was a solution that was safe and secure, more importantly, it was reliable and cost effective. Rubiconn migrated the data required to our Remote Application Hosting Servers at no charge to the client.

“Rubiconn is second to none in their responsiveness to IT issues and technological knowledge base. They have been a great asset to my companies.”

*Dan Kavanaugh, Owner and CPA
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The monthly fee for the continuing application hosting was very affordable and scalable for the client.

This solution allowed Dan Kavanaugh to accomplish business goal of processing financial information immediately, allowing his clients to see their daily financial position anywhere in the world with an internet connection.

Dan Kavanaugh never expected to get the service he received when he responded to a Rubiconn direct mail flyer. He was expecting to receive a few hours of free labor that might or might not result in a resolution to his phone syncing issues. Rubiconn far exceeded Dan’s initial expectations. Not only has he been able to alleviate stress and solve his internal technology issues in his own firm, but he has also been able to provide a high-end, low-cost solution to his clients regarding their technology issues as well.

Dan is able to serve his own clients better and faster now that his firm and his client’s firms are all sharing data on the Rubiconn Private Cloud. He has also benefited from a true Strategic Partnership with Rubiconn as his IT Consulting Firm. “I have used Rubiconn, LLC as my IT consulting company for my CPA practice and outsourced internet based bookkeeping company,” says Dan Kavanaugh,

“When I first engaged them, they immediately solved my IT issues, where other companies could not. They have streamlined my operations due to their wealth of technology based intelligence that will carry over into the future,” says Dan, “Their management and support teams set the bar at where the business owner thinks the bar should be. They are excellent in finding ways to reduce monthly IT costs while increasing efficiency. Rubiconn is second to none in their responsiveness to IT issues and technological knowledge base. They have been a great asset to my companies.”

Benefits

- ◆ Consistent, reliable, and time-efficient access to client data 24x7
- ◆ All services are included for One Flat Fee. Finally able to budget for IT expenses and reduce the capital expenditures in IT.
- ◆ Increased speed and improved productivity because of fewer technology issues. Access to data from any PC, anywhere, anytime with Internet connection.
- ◆ The Rubiconn private cloud is scalable. Adding staff takes minutes and the cost is known immediately.
- ◆ Upgrading servers is never an issue. Rubiconn provides resources (servers, desktops, RAM, Disk space) on demand.