

## CASE STUDY

# Marcum Technology Helps Financial Services Firm Shift to a Strategic Approach and Move to a Managed Services Support Model



## COMPANY OVERVIEW

Based in Connecticut, our client provides a suite of highly specialized products and services, including advice on corporate strategy and capital markets, operational support, and more. The company is known for innovating products and services for companies in the financial services, investment management, credit, and government sectors; and in the legal profession.



## THE CHALLENGE

Unhappy with their current IT provider and with no internal IT support staff or desire to hire one, the company wanted a change. IT management sought a go-to partner that could not only provide a comprehensive technology strategy and consulting advice and counsel, but also help them achieve three specific objectives.



## THE GOAL

Our client sought to achieve three critically important strategic IT objectives:

1. Stabilize the company's IT environment and ensure it has the capacity for future growth
2. Engage an IT provider capable of supporting, monitoring, and managing the IT environment, enabling management to focus on the day-to-day business
3. Ensure a secure IT environment 24x7x365, providing the company with the confidence that their confidential data remained safe and secure

## HOW WE HELPED!

After assessing the IT environment to understand our client's unique needs, Marcum Technology's team, including a solution architect, dedicated project manager and subject matter experts (SMEs), worked collaboratively with the client to design the right solutions to meet current and future needs.

To address the company's infrastructure needs, Marcum's team migrated and upgraded the client's virtual machines to Marcum Technology's Infrastructure as a Service (IaaS) solution, which ensures current and future computer and data storage needs will be met. Marcum's IaaS provides this growing company with a stable IT infrastructure that's easily scalable to accommodate future growth.

Marcum assessed the company's backup and disaster recovery needs to ensure business continuity following a disaster or business interruption. To relieve the company of those worries, Marcum Technology's Service Desk now supports the client's day-to-day operations. In addition, Marcum implemented a 24x7x365 solution to monitor and manage the new environment through our Network Operations Center.

This means the client never has to worry about infrastructure equipment failing in the middle of the night without notification or having to keep up with operating system and security patches. It also enables the company to access Marcum SMEs—without the cost of staffing up. And to ensure full transparency into the company's IT environment, Marcum provides regular reporting and quarterly business reviews, and the opportunity to work with Marcum Technology SMEs on new initiatives, all as part of the overall solution.

## MARCUM TECHNOLOGY CASE STUDY

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After carefully analyzing the company's vitally important data security and privacy requirements, our team recommended Marcum's Managed Detection and Response service, which cost-effectively provides real time managed threat detection, hunting, containment, remediation, and response. The custom-designed system allows for continuous recording, centralization, and correlation of endpoint activity to detect attacks other defenses might miss. Not only does this fully managed security service help reduce the time, effort, and costs associated with incident response, but it also provides the client with its own 24x7x365 virtual system and organization controls, protecting against advanced attacks without having to fund a team of security experts on staff.

### THE SOLUTION

Our client has peace of mind that their confidential data has remained safe and secure. The company recognizes the tremendous value of investing in the right managed services provider as a long-term strategic resource to help achieve its strategic IT objectives, enhance productivity, and reduce operational risk. The company's confidence comes from knowing that Marcum Technology views the monitoring, management, support and security of our clients' environments as if they were our own.

### MARCUM LLP AND MARCUM TECHNOLOGY SERVICES

Are you truly positioned for success? Start the conversation about a more strategic approach to accomplishing your business goals.

#### Ask Marcum.

To learn more about Marcum LLP and Marcum Technology's services contact us today at:

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### MARCUM TECHNOLOGY DELIVERY TEAM



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### QUOTE FROM THE CLIENT

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I have to say that I can sleep better at night knowing that Marcum Technology is there watching over our environment.

— Chief Operating Officer