



Connected
Office  for **ACCOUNTING** Success

The Customer

Robert Hall & Associates is a full service tax, accounting and business consulting firm located in Glendale, California. A progressive family-owned firm with over 20 employees and over 13,000 clients in their database, Robert Hall & Associates is experienced in all matters of taxation (preparation, planning, problem resolution), estates and trusts, business formation, financial planning and investment, real estate and business sales.

The Situation

Accountants are the trusted business advisors of the world. Whether a client goes to see their accountant for personal or business-related help, they need to have absolute faith that the numbers they divulge in his or her office will be handled with the utmost care and security. Accounting firms understand this and, as a result, place the handling of their client's data at the top of their technology checklist. Being a progressive and responsible firm, Robert Hall understands that their clients' trust hinges on both their expertise and their ability to safeguard their critical information. For that reason, as well as from a purely day-to-day, ease-of-use perspective, they made the move towards a paperless office. To do so, they turned to Laserfiche® solutions provider Adjamian Affiliated Inc. - a Utility Service Provider in Southern California. After working with Adjamian on their document management systems, next the Adjamian Team laid out a proposal to further safeguard Robert Hall's critical IT infrastructure and provide them with critical Line of Business software support, particularly in their grueling three month tax period.

The Solution

Robert Hall made the switch to a fully managed Connected Office for Accounting program in December of 2008, just before their busy tax season (February through April). One of the first things The Utility Company did (besides a few infrastructure upgrades) was an update of Hall's main line of business application, Lacerte® Professional Tax software. Linda Kallis, Office Manager for Robert Hall, described her firm's reliance on technology, and Lacerte in particular as "really critical - we essentially can't get work done if the system is down and everyone starts calling me..."

For the duration of tax season, Linda also wisely chose to go on Utility's available extended support hours - meaning if they had **any** issue, at **any time of day or night**, they had access to a certified Utility technician. "During tax season, we don't work just 9 to 5. It never fails that if we need to call for advice on something, we need to do it after regular business hours. Being under a managed program we knew that our infrastructure was constantly monitored and managed, but from February to the end of April we wanted the ability to contact the helpdesk at any time for any questions our staff might have".

The Result

The Connected Office for Accounting service program provides Utility customers with a single point of contact to deliver and manage all of their technology, communications and vertical line of business applications – **95% Remote; 100% Proactive**. Robert Hall & Associates main concerns about their use of technology are around availability (uptime) and redundancy in their handling of data. More specifically, since switching to Utility they have:

- **Experienced 100% availability of their servers.**
- **Implemented a full server failover plan (where if one server goes down everyone can continue working on a redundant one).**
- **Significantly reduced their end user support issues through the proper maintenance, clean up and safeguarding of their workstations.**
- **Standardized every workstation and documented their network (this information was not documented anywhere previously).**
- **Put their fears of losing client data to rest.**
- **Enjoyed having 1-866-My-Utility Live Helpdesk available to them 24 x 7 during their busiest season.**

Customer's Thoughts

“As the Office Manager, I am in the sometimes unenviable position of having everyone come to me if there is a problem,” stated Linda Kallis, Office Manager for Robert Hall & Associates. “I’m very happy with The Utility Company. Their responses have been instantaneous. Even when we’ve experienced some strange hiccup with our main software, Utility has been able to get it fixed right away. When you are in Tax Season, every moment counts and it’s nice to have one less thing to worry about...We can concentrate on our clients.”

Utility's View

“As a fellow accountant and a former partner in a mid-size firm, I realize the challenges and opportunities technology presents to most accountants”, stated Mark Scott, President and Founder of The Utility Company. Robert Hall & Associates’ concerns around technology, as it relates to their profession, are very typical. Our programs are designed for small and mid-sized firms to turn technology into a profit-driver for their firm – cost-saving and revenue-generating. But perhaps more importantly, they are designed to help our accounting clients remain the trusted business advisors to their clients.”

About The Utility Company

The Utility Company® is a leading provider of virtual IT service and support for small and medium-sized businesses, delivering the required hardware, software and service for a monthly fixed fee per user.

Our Connected Office® service program provides a single point of contact to deliver and manage technology, communications and vertical line of business applications – **95% Remote; 100% Proactive**.

Customers are supported by local Utility Service Providers delivering on-site service and business-technology consulting to reduce spending and increase utilization – our Beyond Managed Services® franchise opportunity is available by prospectus only.

Learn how to make technology work for your business today at theutilitycompany.com