



CASE STUDY

HAVE SUPPORT, WILL TRAVEL



THE CUSTOMER

Bentz Whaley Flessner

INDUSTRY

Fundraising

THE SOLUTIONS

Orange Book Analysis, 24x7 Remote & On-Site Support, Workstation Management & Backup

BENEFITS

- Improved consultant productivity
- Consultative and trusted IT partner
- Future-oriented IT partner
- Elimination of vendor communication problems

THE SITUATION

For more than 30 years, Bentz Whaley Flessner (BWF) has provided full-service fundraising counsel to colleges, universities, and academic medical centers. They help build strong institutional advancement programs and execute successful campaigns for national and international clients. BWF's fundraising experts and consultants leverage their skills from London to Los Angeles. Their consultants' offices are often wherever they open their laptops.

In the Spring of 2015, the unthinkable happened, Bentz Whaley Flessner lost all their end user laptop data in a data encryption service gone wrong. The vendor performing the service had lost everything and BWF was left without their reports, their client data, or any of their business software for their remote users. To say that the remote consultants losing all their data was a devastating blow, is an understatement.

Meredith Berry, Director of Operations at Bentz Whaley Flessner remembers that day quite clearly, "Everybody's data was wiped clean and there were no backups. It was disastrous, and they [the legacy IT vendor] couldn't get things to work again, which cost

us money and productivity." That wasn't the entire story though. BWF had been having issues with the service and reliability of their IT Managed Services Provider for years. It was well past time to look at other options. Meredith relates a bit more about the situation.

"When we would call our previous provider, you would never get a human, the call would go straight to voicemail. They were supposed to call you back. IF they called you back it might be two or three days later. There was an emergency line option, but incredibly that was a voicemail too. Sometimes, they would call you back within an hour and sometimes it was the next day."

This meant that IT problems were rarely getting addressed in a timely fashion for the on-the-go consultants of BWF. On top of that, poor support service started to encourage employees to ignore the less serious IT issues they had. Instead, they would find workarounds that were less than ideal, or just learn to live with the broken systems and tools they were using on a daily basis. Long term, this sustained frustration with inoperable systems can impact productivity and can possibly lead to higher

employee burnout.

"By the time Atomic Data came to us, our people had figured out some workarounds, and they were ignoring things, and not doing updates...basically any shortcut they could find to keep things limping along, just so they didn't have to call and deal with the runaround."

Naturally, Meredith did what she could to get results. She tried to follow up by calling the assigned account manager to get status updates and put the pressure on to get tickets handled. However, the assigned account manager was routinely changing just as they were getting up to speed on BWF's environment. BWF rarely knew if their tickets were even being worked and no one at the provider seemed to know either.

"I had no one that I could go to, because their turnover was so high and I had to build a new relationship every four months. So that was a big pain point for us. Just a lack of service. We had just reached a breaking point with our previous provider," remembers Meredith.

Understandably frustrated with their current MSP and the situation, many at BWF were tempted to go back to pen, paper, and typewriters. But instead, BWF decided to search for a partner in technology they could trust. Berry and other leadership at BWF let their professional network know that they were looking for a new MSP they could count on. A CTO they commiserated with at another company suggested giving Atomic Data a call.

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THE SOLUTION

Atomic Data came in and immediately recommended a system level analysis, known as an Orange Book, of BWF's environment. The Atomic Data Orange Book is a fact finding and inventory



taking process of hardware, applications, and systems. An Orange Book determines what the essential pieces are, identifies the deficiencies that keep the infrastructure and employees from being effective, and outlines a future-state plan to simplify budget planning and create an end goal.

The Orange Book identified some key problems for Bentz Whaley Flessner that they knew they had, like poor technical support, no comprehensive end-user backup plan and a lack of preventative maintenance and planning. There were some other recommendations they were not expecting though, including, migrating to the Atomic Cloud, improving network security, and adding network monitoring.

The number one solution for BWF was the Atomic Data Service Desk. A 24x7x365, Minneapolis-based support team that is on hand to field end-user and basic systems-level issues as well as provide a direct escalation path for more complex network, systems, and software problems. These escalation paths to subject matter experts are available to deal with any IT-related issue that might arise day or night. Someone is always on call

to deal with an emergency IT issue. Be it an offline server or a firewall blocking the wrong traffic, Atomic Data's Engineers are a call, click, or email away to handle the situation and get the systems back up and running.

Code42's CrashPlan™ was another solution that Atomic Data suggested to deal with the lack of a backup plan for BWF's remote consultants. CrashPlan is a simple, reliable backup solution designed for the on-the-go business traveler. It functions unobtrusively and backs up data when a reliable internet connection is available. The employees of BWF would never again have to worry about losing years of data in the blink of an eye. It would all be backed up in Atomic Data's SOC audited data center and available at a moment's notice.

Lastly, the Orange Book identified the need for proactive IT services that only an On-Site engineer can supply. Atomic Data's On-Site team is a group of highly trained Microsoft-certified engineers who have seen it all and solved it too. They put boots on the ground at client offices to ensure that issues are identified and targeted before they become full blown problems. On-Site engineers come out to client locations on a weekly basis to ensure server maintenance, network configurations, project management, and IT planning are handled properly. They become a regular fixture in the offices they go to and are key to a healthy IT partnership.



IMPLEMENTATION

"There are some big technology skeptics in our organization, but they also knew this (transition to Atomic Data) was necessary.

Our data was gone in an instant and our remote users were terrified that it could happen again. Atomic Data was extremely patient, helpful, and understanding. The engineers came in to talk solutions and reassure the executive team on the proposed plan and how it would mitigate our previous frustrations," recalls Berry.



So BWF moved forward with Atomic Data and their solutions. The implementation started in the fall of 2015 and there was a good deal of anxiety for BWF about it. Leadership and employees at BWF were just not very trusting of IT vendors at that point due to their poor track record.

It's understandable that BWF was slow to trust a new IT partner, but Atomic Data quickly showed them why they are a cut above the rest. "I can't speak highly enough about the Atomic Data

implementation team. They were incredibly patient and worked tirelessly to get things transitioned seamlessly and quickly." Bentz Whaley Flessner's legacy IT provider was less than thrilled that BWF was leaving them and showed themselves to be stubborn and unhelpful in the transition, but Atomic Data was able to work around them and get BWF transitioned and fully operational in short order.

"The relationship and the trust is there with Atomic Data. Our teams now communicate with Atomic Data about everything."

– Meredith Berry, Director of Marketing & Business Development

"Overall, there was calm. It was professional. It was managed. And then on that Monday morning after the migration, email was coming in and things were working, people breathed a sigh of relief." Most important, no data had been lost.



THE BENEFITS

BWF started to see the results of a partnership with Atomic Data quickly. The folks at Bentz Whaley Flessner could see that Atomic Data wasn't like their old IT vendor. When they would pick up the phone and call the Atomic Data Service Desk, or send in an email, a Service Desk Technician would ticket and handle that issue quickly or get it to a resource that could handle it. That first month, Atomic Data Service Desk Technicians dealt with many of those tickets and issues that the consultants of Bentz Whaley Flessner had been putting off.

Atomic Data was prepared for this burst of tickets and calls from BWF because the Service Desk studied the BWF environment and then created training to prepare for the go live date. "The relationship and the trust is there with Atomic Data after we were somewhat wary at first because of our last IT vendor. Our teams

now communicate with Atomic Data about everything."

The consultants of Bentz Whaley Flessner were getting their IT issues addressed as they arose and as a result, productivity improved. Meredith was impressed and remains ecstatic about this level of service and issue resolution.

Everything works as it should now, and our consultants are to the point where they are no longer coming to me to expedite issues. They are getting taken care of and in many instances, I don't hear about it until after the issue is resolved. They used to ignore their technology issues, but now there is trust there that they will be listened to and Atomic Data will work with their difficult schedules to get the issue resolved. We truly appreciate the partnership that Atomic provides to BWF, at all levels.



As for CrashPlan, Meredith and BWF have also been impressed. If a document gets overwritten or becomes corrupted, CrashPlan is there. If a laptop is lost or broken, CrashPlan has all the data needed to get the BWF consultant back up and running. These situations arise and Atomic Data's CrashPlan deployment has dealt with them seamlessly. With a backup solution like that, BWF's consultants feel confident that any major issues can be resolved quickly and with relative ease.

Recently, Bentz Whaley Flessner has been working closely with Atomic Data to rollout new laptops to all its employees. The On-Site team determined specifications, planned, acquired and deployed all the laptops. Getting the laptops imaged with their applications and into the hands of a remote consultant can be challenging though. The remote consultants receive the laptops and must get right back on the road or catch a plane. There's no time to see if they work or are configured correctly. So there has to be a lot of forethought and trust put into these deployments.

It used to be that when BWF went through this process with their old vendor, the new laptops would be shipped to their consultants, but they would not be fully set up and data would be missing. So the consultants at BWF had to find the time to do these tasks themselves. Now with Atomic Data imaging and configuring the laptops, the turnaround time is much faster and the consultants are up and running quickly.

With the legacy IT provider, a lot of proactive management of BWF's systems and technology was promised but never

delivered upon. With Atomic Data as an IT partner, that has changed. The Orange Book analysis is merely the first step in ensuring that Bentz Whaley Flessner is on the right technology path. On-Site Engineering and the Account Manager work closely with Meredith to dive into the details of ticket patterns, ongoing issues, and break down the larger IT vision for BWF, too. Monitoring, patching, preventative maintenance, warranty tracking, and hardware replacement plans are all part of the approach.

"I can't say enough good things about our Account Manager. She always has her finger on the pulse of what's going on with our company and the trends that we are seeing in the tickets. She ensures that when there is an emergency situation, that Atomic Data's response is coordinated across multiple departments. I felt with the previous provider, that I had to be responsible to make sure they were working for us and I have never ever once felt that that was true with Atomic Data."

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LOOKING AHEAD

There's renewed optimism about technology at Bentz Whaley Flessner amongst leadership and the consultants. They are excited for new tech and quick to adopt tech tools that are made available. Even in leadership where some were initially skeptical, they are now consistently looking for ways to harness technology to supplement BWF's work and increase productivity.

Bentz Whaley Flessner's goal is to double their size in the next

five years. To do that they need to "become more seamlessly remote." Accomplishing that without updating some systems and adding some technology is just not possible, explains Meredith. Atomic Data is assisting BWF in creating a roadmap to scale their technology to meet that five-year goal. "I cannot see moving forward without Atomic Data being an integral part of the process."



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