

Case Study

Accounting Firm Migrates to the Cloud with Office 365

The Background



For over 30 years, Rubino & Company has been helping clients with complex accounting, tax and financial planning issues. The firm specializes in serving government contractors and non-profits and providing outstanding public accounting, tax advisory services, regulatory consulting, and financial services to clients in the Washington, DC metropolitan area. Rubino & Company is nationally recognized as a leader in regulatory consulting and financial services, and also maintains an international presence.

The Challenge

Rubino & Company had been using GroupWise email for about 13 years and had realized that it was time to upgrade and migrate to Exchange. GroupWise did not have a built-in functionality to archive emails, backing up was a monumental challenge and it had limited scheduling capability. But perhaps the most significant deficit was the lack of any e-discovery functionality. "With the number of users and amount of data we had, GroupWise was very cumbersome to use," says Andy Bevan, Network Administrator for Rubino & Company.

Bevan had researched various options and concluded that moving to the cloud, specifically, Office 365, was the appropriate solution. As the sole network administrator, Bevan knew he would need help with the migration. "We'd discussed such a migration with Nortec about a year ago, and so when the time came to implement the project, we contacted Nortec to get started," says Bevan.

The Solution

With 60 users who needed to be migrated over and tax season coming up, Rubino needed to implement the project over a few months. Bevan also asked to be involved in certain aspects of the migration. Nortec presented a project plan, timeline and budget that met the firm's needs, as well as trained Bevan on pre-configurations and other tasks he could execute on his own. "Nortec kept us informed in terms of progress and budget and communicated often," says Bevan. "We actually came in under the number of hours initially budgeted and saved the firm some money."

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The Benefits

In addition to transforming the firm's calendar and scheduling systems, the cloud solution has streamlined archiving and backing up data. Bevan says that Office 365's e-discovery functionality has been perhaps the largest benefit. "Now it's just a matter of setting a policy and all our information is retained," says Bevan. "We have much greater efficiency and fail safes in terms of data."

For more information on Nortec, please contact us at georgeh@nortec.com.