



Petrinovich Pugh & Co partners with INFINIT® Consulting to strengthen customer security using Office 365 and Enterprise Mobility Suite

“Cloud-enabling a business is a technology transformation solution. The reality is that cloud solutions like email are commodities. The real question is how to increase productivity. Which tools and processes will turn a small company into a large one?”

*Jerod Powell, Founder and CEO
INFINIT Consulting*



“How does a small company become a \$10 million company? The key is the right infrastructure.” So says Jerod Powell, founder and CEO of INFINIT® Consulting, Microsoft’s 2015 US SMB Champions Club Northwest Area Partner of the Year. A small company with 190 customers ranging in size from 2 to 900 employees, INFINIT offers managed services to help organizations be more efficient, cost effective and responsive to market changes.



Office 365 + EMS for a strong IT foundation

INFINIT gets core IT into the cloud for customers across industry segments from legal, construction and wealth management to financial and professional services. They insist their managed services customers adopt both Office 365 and Enterprise Mobility Suite (EMS) together. "If they don't, we won't take them on," Powell explains.

"We want to get people on a path to keep up with technology changes over the next five years. To do that, they need the right IT foundation." Once customers understand the value Office 365 coupled with EMS represents, Powell says, they are more than willing to adopt them as solutions. "When we tell them that helpdesk calls can drop by half, they realize they can get by with two helpdesk people instead of three." Larger accounts immediately recognize the potential cost savings from not having to manage dissimilar services from multiple vendors.

A solid IT foundation in the cloud allows INFINIT to address another area of critical concern to their customers: security. "Customers want better threat detection in addition to control over who has access to company resources and data," Powell explains. "Their nightmare is having to notify their clients that they've been hacked. We sell EMS not as a technology, but as business security."

Security, security, security

One true believer is Petrinovich Pugh & Co LLP (PP&Co), a regional CPA firm based in San Jose, California. After INFINIT moved them to Office 365, PP&Co became a partner in addition to a client. "Like many CPA companies, we used to be a Value Added Reseller of accounting systems," explains Sean

McLean, PP&Co's IT Director. "We also had a small practice of Microsoft Certified System Engineers who deployed Small Business Server, but it became defunct with the arrival of Azure, so we decided to go down a different path."

After McLean's arrival, the company created an IT consulting arm that helps customers not only with accounting systems, but also with email hosting, security, and everything in between. The CPA side of the firm is the subsidiary's major source of clients. When a customer meets with PP&Co regarding an audit or tax issue, McLean provides an assessment of their technology to point out where it's lacking, especially in the area of security.

"Some old-school brick-and-mortar clients believe it's too dangerous to keep information in the cloud," McLean comments. "We serve high wealth individuals and closely held companies who *think* they understand what security entails. To them, redundancy is having a RAID array on a single on-premises server. They keep their data on-premises to keep it 'secure,' but every port is open and the system is eight years old. Other businesses have their heads in the sand, cross their fingers, and hope nothing happens. Next thing you know they come to us and confess that they lost all their data."

The biggest issue is low awareness about security protection. "Some clients don't value technology until they see what they're missing," McLean continues. "To keep operating at the risk of losing data on a gigantic project that might be audited is crazy," he says, "and we tell them so. We bring in the CPA mindset of redundancies and risk aversion."

"Even though EMS is a relatively new product, it's already gaining a lot of buzz with CPAs in the financial world."

*Sean McLean, IT Director
Petrinovich Pugh & Co LLP*

Customer: Petrinovich Pugh & Co LLP
Customer Website: <http://PPandCo.com>
Region: San Jose, CA, USA
Industry: Finance
Size: 60 employees

Partner Name: INFINIT Consulting
Partner Website: <http://www.infinitch consulting.com>
Partner Profile: INFINIT Consulting cloud-enables businesses, focusing on data automation, communications and collaboration, security, compliance, support, and strategic technology guidance.

Campaign: US SMB || EMS





McClean advocates a blended security approach from firewall to workstation security, to protection against socially engineered attacks. "Our clients fall into traps, particularly around tax deadlines." McClean laments. "They get an email supposedly from us and even though they know we don't use Dropbox or have a CPA named Mike, they still fall for these schemes. People are conditioned to click on anything, whether it's the funny video Bob sent or an embedded link." He is a strong advocate of Advanced Threat Analytics, which comes with EMS.

"ATA predicts hotspots, determines whether something is a virus and dynamically blocks those attacks. It gives us stronger zero-day protection."

EMS: a two-phased approach to peace of mind
McClean recommends EMS as a two-phase deployment.

"Phase One gets you into the cloud and lets you manage not just your PCs, but also your mobile devices. This establishes a security baseline. Updates happen behind the scenes, so they don't interrupt people. People don't really notice." After Phase One, McClean explains, EMS has changed workflows and everyone has recognized clear and tangible benefits.

"Virus incidents go down and password change management goes down. Customers understand what is happening with their devices, which is critical from an auditing perspective. If there is a breach, they must provide records to different authorities. If they know which machine was compromised, they can tell what information the hackers got access to."

Phase Two is about business transformation. "Once customers have a stable environment, that is, once their infrastructure is ready to go, they can start mining it with business

intelligence tools," McClean says. He likes to demo PP&Co's own hosted system to show customers what's possible. "When they come into our business and see how we're operating, they say 'this looks pretty smooth, this looks like what we need.' We hook them up with INFINIT and I serve as the customer advocate."

The goal, he maintains, is to help customers be fully secure and view their business through a centralized dashboard as well as from clear, digestible reports. This is very attractive to CIOs who represent CPA firms.

Powell concurs. "CIOs get presented with all sorts of shiny pennies," he says. "But which one is most optimized for your business processes? Companies are concerned about business value, especially when they grow above 50 employees. Office 365 plus EMS helps them manage, secure, and control their cloud infrastructure. Once they have that, scaling the environment is easy."

Products:

Office 365
Enterprise Mobility Suite

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