This case study reveals how Cygnet, an accounting firm, has benefited from outsourcing its IT operations to a managed service provider, Kaine Mathrick Tech.

As organizations are relying more on Information Technology to carry out their business processes, IT development and maintenance costs have gone considerably high. Consequently, many companies are now considering transferring their IT assets to third-party vendors that help reduce costs while helping them staying ahead in competition. Outsourcing business IT processes helps organizations focus on their core competencies, increase cost savings and flexibility and access state-of-the-art technology.

# The Client

Cygnet is an accounting firm based in Melbourne with 16 employees. It specialises in growing businesses by helping them build strong, secure financial futures, and optimizing their accounting and wealth management practices to meet their commercial and lifestyle goals. Backed by decades of experience and personal care, their team provides practical advice and solutions to free their clients to focus on the decisions that matter most.

Cygnet has two offices located in Melbourne and Hobart and have an accounting arm and a financial planning arm that worked separately until recently. Before Kaine Mathrick Tech came onboard, their co-founders were managing all technology, including IT support operations. The decision to outsource IT stemmed from the realization that there was a need to bring about improvement in their IT systems and processes. They needed professionals to handle their IT, while also removing any IT responsibility from Cygnet staff to KMT. This would enable Cygnet team to free up their time to work on their business. They would also no longer have to worry about IT, or spend valuable time and energy fixing problems or managing their infrastructure.

# Finding a Partner in KMT

Cygnet team met KMT’s Matt Dixon [designation] at a golf day (Melbourne Network Annual Golf Challenge). Together, Matt and Brad [Designation] presented to Cygnet about how KMT could deliver the solution for their business.

Cygnet was looking for a partner, and not just a service provider. Not only were they convinced about how KMT could deliver the right service, they also believed they could trust them with their honesty and open communication.

Mr. Jeremy Swan, the [Designation] at Cygnet said, “We liked them in the first meeting. We were confident they would deliver the right IT solutions, but we wanted to know we could work with them as our IT partner and trust them to do the right thing. From the beginning we liked what they were saying, they were up front, honest and didn’t speak all geek talk to us. We felt KMT was a good fit.”

# The Solution

KMT helped Cygnet in three areas. Firstly, it took charge of all their IT support operations. Secondly, it integrated the two business arms of accounting and financial planning onto Office 365. Lastly, it provided complete assistance for Cygnet’s office relocation on the IT front.

## Maintaining IT Infrastructure and Support

At the very start, KMT was engaged to manage the IT support, backups, and proactively maintain infrastructure for Cygnet. This was a great help as KMT removed all ‘noise’ and complaints around IT – it just worked.

KMT took over the management of providing structure around management of users, systems, policies and procedures, and onboarding new staff. The team also ensured that business applications were up to date, backups were regular and properly managed, and maintenance and patching of software and applications was up-to-date. They also provided a standardised IT environment which made things stable. Cygnet could be confident that software and antivirus systems were consistent and compliant whereas earlier the environment had lots of things on lots of computers.

## Consolidation of two businesses onto one Microsoft Office 365 Tenancy

KMT also assisted Cygnet with merging the accounting and financial planning business infrastructure of Cygnet. This was important to ensure that they had a solid IT platform that was adequately protected from cyber-attacks and was operating out of Microsoft office 365.

Cygnet’s accounting business email was using Gmail and the financial planning one was using Office 365. KMT proactively advised that Gmail was not an appropriate email tool to use for a business of their size. They recommended a migration across to Office 365 and consolidated both businesses into one Office 365 tenancy so that they could run one account.

KMT carefully managed and planned the migration and integrated the two businesses from an IT perspective ensuring that there was no downtime for staff and they didn’t lose any emails or data.

## Office Move

KMT assisted with the IT component of the Cygnet office relocation in Melbourne. Many things needed organization. Servers and hardware had to be moved and new hardware had to be ordered. The outcome of the project was no downtime for staff and KMT managed the entire project from start to finish. Cygnet didn’t have to worry about a thing. Everything ran smoothly.

Jeremy said “There was so much to organise during the relocation process, from finding a location, negotiating leases, purchasing desks and office fit out. It was a big project for us. But we knew we wouldn’t have to worry about anything related to the IT as we were confident that KMT had everything in hand.”

# Value Delivered

Jeremy believes that KMT has provided tremendous value in terms of solving Cygnet’s IT duties.

“Before KMT, we found that IT was problematic. We now have no IT issues. Even for transitioning to remote working, we did not skip a beat,” Franklin said. “IT runs smoothly, you know when IT is not working properly and staff get naggy about it. Cygnet is enjoying no negative conversations about IT any more. Staff arrive to work for the day and it just works.”

He was also all praises about the staff at KMT, particularly about how they explain complex IT issues in plain language and explain what is needed for the business. The staff make it particularly easy for the IT-challenged.

The support is particularly helpful in case something goes wrong and one needs to contact to solve an issue. “I call my Account manager for all of my larger account issues and have faith in Anthony that he will get things done. Central point of contact for strategic, account or advice issues - rather than going to IT support which are really there to support our day to day IT technical issues,” Jeremy said. “KMT’s Communication is proactive, informative and clear. If there are changes to anything related to my account, it is dealt with well in advance and I feel like they really are a true partner.”

# Measuring the Impact

In terms of measuring quantifiable benefits of the impact the change brought to the overall business, Cygnet was able to save downtime of 8.5 hours (a month?) and a total of one month (annually?). Going literally from dealing with IT to dealing with nothing IT-related, the true gain was achieved in the form of Time. Time to focus on core business operations, avoid dealing with technical issues, and stopping problems before they became problems. It would be days a month that were gained back by not dealing with IT issues.

# Outsourcing IT – The Right People with the Right Expertise

For Cygnet, what differentiated KMT from others was the people. They believed them to have made a huge difference. “There is an expectation that KMT understands technology – it’s a given that KMT will get the IT right. They are very capable as an IT partner. But it is the way the staff manage our issues,” said Jeremy. “Communication keeping us abreast of the progress of issue resolution, the regular account meetings and the personal approach of the team is what sets them apart.”

For them, it is the ease of conversation and being able to get in touch with a central contact any time to cater to their requirements is what sets KMT apart. “We have easy conversations with the right people at the right time and we know that our issues will be actioned and resolved quickly. We are confident that all issues will be resolved within a reasonable time frame.” he said.

He went on to mention three words that describe the value proposition of KMT, “Approachable”, “Down to Earth” and “Efficient.”

Jeremy credits KMT with being a big help during their office move and adjustment to work-from-home model during the pandemic. He said, “Moving our office was a huge project for us. The one thing we knew we would not have to worry about was the relocation of our IT. We had the confidence that KMT would get it right and they did.”

“COVID took everyone by surprise and working from home initially was a big adjustment. KMT was on the front foot and they were quick to act to get our team working from home”, Jeremy said. “Any issues were dealt with quickly and effectively and communication was clear and timely. It really was easy and seamless.”

Currently, Cygnet is functioning with confidence that their IT system is running smoothly in safe hands. After achieving expertise in handling IT by outsourcing it to KMT, they are focused towards their core competencies – accounting and financial planning, while staying at par with the competition.