**Case Study Template**

Thank you for agreeing to become one of our KMT case studies and feature on our website. There are a few questions we really appreciate you filling out for us so we can draft a full story to be featured on our new website, across our social and other channels.

**Company Details:**

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| **Company Name:** | Cygnet Group  [www.cygnetgroup.com.au](http://www.cygnetgroup.com.au) | **Client Contact:** | Jeremy Swan |
| **Logo Provided:** | Y/N | **Photo Provided:** | Y/N |
| **Industry:** | Financial Services | **Number of users:** | 16 |
| **Company Offices:** | 2 | **Company Locations:** | Melbourne  Hobart |
| **Company Founded** | ??? | **KMT Start Date** | 2018 |
| **Company Profile:**  ***Please provide a short description including founded, what you do and any achievement.*** | Cygnet specialises in growing businesses, building strong, secure financial futures and optimising your accounting and wealth management practices to meet your commercial and lifestyle goals. Backed by decades of experience and personal care, our team provides practical advice and solutions to free our clients to focus on the decisions that matter most. | | |

**Approvals:**

Seeking permission to utilise your answers, quotes and information provided on the following forums for the duration of our client relationship.

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| Facebook: | Y | Website: | Y |
| Instagram: | Y | EDM: | Y |
| Linked in: | y |  |  |

**Questions for client**

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| What challenge were you facing?  *What were your top three points of frustration you were experiencing.* | Cygnet are an accounting firm based in Melbourne with 16 staff.  They have two office located in Melbourne and Hobart and have an accounting arm and a financial planning arm that worked separately until recently.  Before KMT came onboard, our co-founders were managing all technology including IT support. When the decision was made to outsource, the idea was to remove any IT responsibility from Cygnet staff to KMT. It was time to improve their IT systems and processes and outsourcing seemed the best solution.  This enabled the Cygnet team to free up their time to work on their business and no longer worry about IT or spend valuable time and energy fixing problems or managing their infrastructure.  At the very start KMT was engaged to manage the IT support, backups, and proactively maintain our infrastructure. 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, onboarding new staff. They also need to ensure business aps were up to date, backups were regular and properly managed and maintenance and patching of software and applications was current. 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 before the environment had lots of things on lots of computers.  After a time, KMT advised us that we needed to merge our accounting and financial planning business infrastructure to ensure we had a solid IT platform that was adequately protected from cyber attacks and was operating out of Microsoft office 365. |
| What were the top reasons you selected KMT for this service? | We met Matt Dixon at a golf day (Melbourne Network Annual Golf Challenge).  Matt presented to us with Brad. The presentation was enough for Cygnet to feel confident that KMT would deliver on what they said they were going to do. They were confident and had an expectation that KMT understood and could deliver the right technology solutions for their business, but they wanted to be sure that they could work with them and that they would be a good fit as a partner.  Cygnet Jeremy commented “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.” |
| What did KMT do that helped you solve your problem or overcome your challenge?  *What was the solution and services provided?* | **Consolidation of two businesses onto one Microsoft Office 365 Tenancy**  Cygnets accounting business email was using Gmail and the financial planning was Office 365. KMT proactively advised Gmail was not an appropriate email tool to use for a business of their size and recommended a migration across to Office 365. Consolidating both businesses into the one Office 365 tenancy so they run the one account.  KMT carefully managed and planned our migration and integrated the two businesses from an IT perspective ensuring that there was no downtime for staff and they didn’t loose any emails or data.  **Office Move**  KMT assisted with the IT component of the Cygnet office relocation in Melbourne. Many things needed organisation such as servers and hardware moved and new hardware 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.” |
| What was the most positive experience you had either using our service, or during the project/instillation?  *What benefits did your business enjoy once the solution was implemented?* | All from Jeremy’s perspective:  “Before KMT we found that IT was problematic. We now have no IT issues. Even the transition to remote working, we did not skip a beat. “  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.  At KMT The staff are fantastic. They speak plain language to explain complex IT issues and understand what I need for my business. They make it easy for the IT challenged.  The account management process is great because I have a central contact to call if something goes wrong or I need to chat about a business challenge we are having that IT could solve. 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.  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. |
| What specific metrics can you share about the impact it has had?  *Do you have any measurable % changes?* | **8.5 Hours**  **A month saved in down time**  We literally went from dealing with IT to dealing with none. Our metric gained is Time.  Also stopping problems before they come problems.  It would be days a month that we have gained back by not dealing with IT issues. |
| What is the single biggest reason you would recommend our offering? | The main differentiator with KMT is the people – they make 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. 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.  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.  Three words to describe KMT:   1. Approachable 2. Down to earth 3. Efficient |
| Please provide a quote that we could use on our website and social media.  + what it was like to go through the project with us  + customer service and how our guys may have gone out of their way  + how the project has improved your business | Moving our office was a huge project for us. The one thing we new 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. Any issues were dealt with quickly and effectively and communication was clear and timely. It really was easy and seamless. |

**Projects Team input**

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| Explain the problem space we addressed:  + overall business problem  + our solution to overcome the problem |  |
| What technology and solution did we provide |  |
| What over and above activity did we do that the client was really impressed with? |  |
| What was the future state and the outcome the client enjoyed when the project was implemented.  What can the client do now that they couldn’t do before |  |
| What benefits did the project deliver |  |
| Any client feedback emails sent? Please attach |  |