



**Case Study:** Implementing a System Backup using iBackup at Investment Marketing Solutions Inc.,

**Company:** Investment Marketing Solutions or IMS is in the Tax and Financial Services Industry: Tax and Financial Services Location: Los Angeles, CA, United States

**Background:** A small tax and financial services company called Investment Marketing Solutions offers tax preparation and financial planning services to individuals and small companies. The company places a significant portion of reliance on its computer systems to manage customer data, file tax returns, and other sensitive data. However, they lacked a reliable system backup to guard against data loss in the case of a disaster or system failure. They had a system for backing up their emails but not their other essential data.

**Problem:** In the event of a failure or disaster, Investment Marketing Solutions runs the danger of losing vital customer information. This is because of the lack of a reliable backup in place. If data cannot be recovered, this might lead to financial losses, damage to the company's reputation, and legal issues.

**Solution:** Investment Marketing Solutions hired a technology consultant, LawrenceQ LLC, to implement a robust and easy-to-use system backup solution to protect against data loss. The LawrenceQ LLC recommended a cloud-based multi-tiered backup system that included daily incremental backups, weekly full backups, and monthly offsite backups. Their solution was to use iBackup, a company in Agoura Hills, CA.

**Implementation:** The implementation of iBackup was completed in two phases. In the first phase, LawrenceQ LLC installed and configured iBackup on all of the company's servers and workstations. Because iBackup was a cloud-based backup system, it was configured to perform one full backup and daily incremental backups. Only one full backup was needed, and incremental backups will work for the remainder of the backups. Weekly full backups were backed up to a local device. Annual archives are also kept for audit purposes. In the second phase, LawrenceQ LLC set up a monthly offsite backup process to send encrypted backup devices to a secure data center in another state.

**Results:** Implementing the backup system had several benefits for Investment Marketing Solutions. Firstly, the protection against data loss in case of a failure, data loss, or disaster. Secondly, the automation of the data process saves time and reduces any risk of human error. Recovering and managing backups is simple and can now be managed by authorized staff. Finally, the cloud-based backups provided an additional layer of protection, ensuring client data would be recoverable even during a disaster such as a fire or an earthquake.

**Conclusion:** Implementing a robust backup system was a critical step for Investment Marketing Solutions in protecting against data loss. The backup system provided peace of mind, automated the backup process, and ensured that client data was recoverable in the event of a disaster. Implementing the backup system was a success and significantly benefited the company and its clients.