

## Case Study: Co-Managed IT Services in the Insurance and Financial Services Industry

### Client Overview:

- **Industry:** Insurance and Financial Services
- **Business Duration:** Over 20 years
- **Services Provided:** Financial investment instruments, employee benefits, and insurance offerings.

### Business Challenge:

The client faced significant challenges with their previous Managed Service Provider (MSP). The main issue was that the current MSP was not aligned with the service needs of the client, leading to numerous problems with customer support and the reliability of the solutions provided.

The impact on the client included:

- Response times for issue resolution that exceeded typical industry SLA standards.
- Frequent failures in problem resolution, often requiring multiple attempts before issues were satisfactorily resolved.

The client's expectations included:

- Ownership of issues with a commitment to resolving them with minimal input required from the client while maintaining security mandated by their corporate office.

### Proposed Solution:

Upper Echelon Technology Group implemented a solution that included:

- Assigning a dedicated account representative to act as a single point of contact and serve as Network Administrator for the client.
- Handling technology issues related to the computer network, VOIP phone system, and Brivo security and building access system.
- Acting as a liaison between the branch office and corporate IT to ensure network security and integrity is maintained per corporate guidelines.

### Implementation Details:

The implementation process involved addressing a long list of unresolved items from the former MSP, returning the client to a stable state within approximately four weeks.

- **Duration:** 4 weeks

- **Challenges:** No significant issues were encountered; the team maintained clear communication with the client, providing updates on the status of reported issues, which was appreciated by the client.

### **Results and Experience:**

- **Measurable Results:** The client now has a support system that resolves technology issues promptly.
- **Business Impact:** The solution improved the client's operational efficiency and responsiveness to IT challenges.
- **Client Feedback:** The client and several staff members have expressed satisfaction with the technology support provided by Upper Echelon Technology Group.
- **Recommendation:** The client is one of Upper Echelon's best references, demonstrating their confidence in the services provided.

### **Key Takeaways:**

- Upper Echelon Technology Group's service and support are unparalleled.
- The company offers a highly curated support system that meets and often exceeds client expectations.
- Years of experience in technology enable Upper Echelon to provide agile support for IT systems, VOIP communications, and security systems.