



Case Study

New Client Onboarding



"You probably hear this about your team all the time, but I would like to reiterate that they are such a pleasure to work with. One of your engineers was here in our office for our onboarding and the next day when we ran into an issue, and he personally came out to our office again for two hours to address it and assist with so many other fires. Not only did he take care of the issue at hand, but he did so with foresight and all while explaining in layman's terms what he was doing and how we can take preventive measures in the future.

I have learned incredible amounts about our tech systems. I'm so extremely excited to be working with him and the rest of the team you have built!"

- Office Manager and
Administrative Assistant to the
CFO

Background

The Terra Foundation for American Art is a privately operated nonprofit organization dedicated to supporting American art exhibitions, projects, academic research, and publications worldwide. Its goal is to promote a greater understanding and appreciation of the cultural and artistic heritage of the United States through the acquisition, study, and display of works of American art.

Terra contacted MXOtech when an acquisition of their current IT provider impacted the support they were receiving, leaving them in limbo and wondering about the fate of their IT infrastructure. MXOtech swiftly took over as Terra's new MSP, and the onboarding began.

The Approach

To commence our partnership with Terra, we conducted a risk assessment, followed by a strategy meeting to present our recommendations and confirm we were addressing all of their concerns. We followed it up with an introductory team meeting to build trust and introduce both teams. In order to set proper expectations from both sides, we reviewed the explanation of services in detail and went through procedures, schedules and a strategy plan.

Following the kick-off session, we began our technical investigation of Terra's IT infrastructure, where we documented all passwords, network information, vendor information, security procedures, and other relevant client information. Typically, a client's previous MSP will go through an offboarding process and provide some information to the incoming MSP. Unfortunately, that did not happen because the client's previous IT company did not have the credential information documented, and it had been lost, leaving MXOtech to play the role of detective and find another way to gain access.

Once MXO gained access to the client's infrastructure, we found several deficiencies. Many switches and firewalls were at the end of life, meaning the server infrastructure was in disarray. We discovered the client did not have Multi-Factor Authentication for Microsoft 365 and was using a home office Wi-Fi connection causing poor operational efficiencies. The organization was also plagued with ongoing phishing attacks, including the CEO, who coincidentally received a phishing email during our audit. Wi-Fi deployment was not installed correctly, leaving deficiencies in the coverage area, including the CEO's office. MXOtech corrected this with Enterprise-grade Meraki Access points.

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Technology

- Enterprise-class networking equipment
- Maraki Wireless Access points
- Maraki switches throughout
- Multi-Factor Authentication
- New Firewall
- Datto/BDR
- Proofpoint
- Password Management

The Approach

MXO took these deficiencies head-on, and the installation of tools began:

- Updated end of life switches and firewalls to protect Terra from outside threat actors
- Installed MFA to enhance security for Microsoft 365
- Switched the client's lackluster small home office Wi-Fi to an extended range Wi-Fi
- Implemented an authentic business continuity solution with backups
- Installed upstream spam filters to reduce the risk of exposure and place the client in a better cybersecurity stance

Prior to opening the helpdesk, we hosted a team meeting with Terra's end-users to introduce MXOtech, explain how we will support them, and the process for submitting support requests. This allows the end-users to interact with the MXO team and ask any questions they may have.

Once we opened the helpdesk and completed onboarding, MXO met with Terra's point-of-contact to outline the completion of immediate goals and obtain feedback on the process and discuss upcoming projects that would be a part of the technology road map.

Outcome

Due to the findings of the technical assessment during onboarding, MXOtech implemented best-of-breed technologies. The upgrade in their systems, business continuity and security has resulted in:

- Peace of mind to the leadership team and staff with a proactive and engaged partner
- A documented network of security vendor information, and applications
- Robust security stack that meets or exceeds industry standards, including best-in-class End-Point Detection Solutions to defend against security threats including phishing, malware, spam, viruses and DNS based protection
- Installed MFA to enhance security for Microsoft 365
- Reliable business continuity plan should disaster strike
- Decreased support issues due to the stabilization and upgrade of their infrastructure that resulted in staff productivity
- Improved wireless connectivity throughout the office for seamless use and mobility
- Ongoing technical business reviews, IT strategy and budgeting, yearly IT road mapping that is aligned with their vision and board requirements