



Microsoft Windows Small Business Server 2003 Customer Solution Case Study

COUNCILMAN, FARLOW & CO., L.L.P.
CERTIFIED PUBLIC ACCOUNTANTS AND CONSULTANTS

Accounting Firm Migrates from Novell to Microsoft, Increases Revenue

Overview

Country: United States

Industry: Financial Services

Customer Profile

Based in Greensboro, North Carolina, Councilman, Farlow & Co. (CFC) provides tax planning and financial guidance to businesses and individuals. It has 8 employees and 12 personal computers

Business Situation

CFC acquired a satellite office, yet its aging Novell infrastructure did not support digital communications between the two locations. CFC wanted to unify its business operations to increase efficiency and save money.

Solution

CFC deployed Microsoft® Windows® Small Business Server 2003 and standardized the desktop on Microsoft Office Small Business Edition 2003.

Benefits

- Linked offices to unify operations
- Saved U.S.\$4,000 a year in communication costs
- Saved U.S.\$2,500 a year in licensing fees
- Increased revenue potential
- Increased productivity
- Improved customer service

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Dale Farlow, CPA and Co-owner, Councilman, Farlow & Co.

Councilman, Farlow & Co. (CFC) is an accounting firm in Greensboro, North Carolina. When it acquired a satellite office, CFC’s aging Novell networking and e-mail solution could not link the two locations. Staffers wasted time travelling between offices and CFC wasted money on duplicate licensing fees, an extra e-mail solution for intra-office communications, and fax, telephone, and courier costs. After CFC migrated from Novell to Microsoft® Windows® Small Business Server 2003 and created a single network for both offices, the two locations worked efficiently as a single entity. CFC is saving approximately U.S.\$4,000 in communication expenses. Using remote access tools, staffers access tax software housed in Greensboro, saving U.S.\$2,500 annually in licensing costs. CFC is seeing increased revenue from a home-based accountant who uses the same solution to help during the busy tax season.



“...[W]ith Small Business Server, Microsoft has a market-proven product that offered everything CFC needed: remote access, networking and data integration, and security.”

Tom Anderson, CEO, Business Information Systems

Situation

Councilman, Farlow & Co. (CFC) has been providing accounting, tax, and consulting services to business and individual clients in the Greensboro, North Carolina, area for more than 20 years. Since that time, public accounting has changed dramatically, and the company now provides an increasingly diverse range of services—management and business consulting, financial planning, and investment counseling, as well as traditional accounting and tax services—to cater to a wide range of clients. In addition to personal attention and quality service, CFC consultants’ wide range of expertise is contributing to the firm’s steady growth, which prompted the company to acquire a satellite office in Archdale, 20 miles away.

However, CFC’s aging Novell infrastructure had not kept pace with the company’s expansion. The last time CFC had updated its single server’s operating system—to Novell Netware version 3.11—was in 1999. Performance was slow and backups had to be completed manually every morning. At Greensboro, seven employees using seven personal computers used Novell GroupWise as their e-mail solution within the office. However, it did not support intra-office communication. CFC had an AOL account to send e-mail messages between the two offices. Minimal interconnectivity between the two locations reduced CFC’s productivity and customer service, while increasing costs.

“We wanted the two offices to function as an efficient single entity, yet our technology didn’t support this goal,” says Dale Farlow, Certified Public Accountant (CPA) and Co-owner of Councilman, Farlow & Co. “Our market is getting more and more competitive, and it’s extremely important to turn the work around in a time frame the client wants. I wasted hours driving back and forth to solve business issues or network problems. In addition to spending money on two e-mail

solutions, we incurred extra fax, phone, and courier bills. And if a customer from the Archdale practice phoned me to ask a question, I didn’t have access to the correct files to furnish an immediate answer.”

CFC’s line-of-business tax application required two licenses, one for each office. The Archdale office, with two staffers and three personal computers, had a simple peer-to-peer network and this needed to be upgraded anyway. The question became how to upgrade the company’s network in such as way as to link the two offices, and to ensure secure data transfer. CFC had no firewall, and its desktop operating system, Microsoft® Windows® 98, was no longer supported. “While nothing happened to our data, we still felt vulnerable,” says Farlow. “It got to the point where we knew we needed a complete overhaul, yet we had to justify the cost with solid ROI [return on investment].”

While there is no IT staffer at CFC, Farlow had taken on some responsibility for the company’s computing environment. However, he’s quick to recognize that his expertise lies elsewhere. “I don’t know what’s available in technology, and when we make a change like this, I need to get educated,” he says. “We had to find a technology partner with the experience to tell us what we needed, and what we didn’t.”

Solution

With the company’s software license renewal date coming up in September, CFC had to find a new solution. One of its clients had completed a successful network upgrade working with Microsoft Certified Professional Partner Business Information Systems, and Farlow contacted CEO Tom Anderson for his feedback on CFC’s situation. “I was impressed with his expertise in the midmarket space,” Farlow recalls. “Tom illustrated clearly the pros and cons of

different upgrade options, and demystified the whole process.”

Choosing Microsoft over Novell

For CFC, the options were upgrading its Novell infrastructure, or standardizing its operating environment on Microsoft products, with Microsoft Windows Small Business Server 2003 operating system, part of Microsoft Windows Server System™ integrated server software, as its new business server and networking solution. CFC had been running a Novell solution for almost 20 years, yet felt some trepidation about the company’s recent endorsement of the Linux operating system.

“When we compared Novell to the ease of use and functionality of Windows Small Business Server 2003, the Microsoft offering was a perfect fit for our company’s size and technology requirements,” says Farlow. “We felt more comfortable with Microsoft backing its product, and with Tom’s expertise and local support. We knew virtually nothing about the open source environment, and we felt Microsoft products are more secure and reliable.”

For Anderson, there wasn’t any doubt. He began working almost exclusively with small businesses when Microsoft released Microsoft Small Business Server 2000 and he understands their needs. “Novell isn’t a real player in the midmarket space,” he says. “Instead, with Small Business Server, Microsoft has a market-proven product that offered everything CFC needed: remote access, networking and data integration, and security.”

The Microsoft Windows Server™ 2003 operating system, Microsoft Exchange Server 2003 communication and collaboration server, and Microsoft Windows SharePoint® Services are all part of Windows Small Business Server 2003, forming a complete

server and networking solution for CFC. Both Windows Server 2003 and Exchange Server 2003 are part of Microsoft Windows Server System integrated server software. Using this solution, CFC can take advantage of e-mail, secure Internet connectivity, business intranets, remote connectivity and support services, file and printer sharing, and backup and restore capabilities.

Anderson began the migration by performing a site survey, replacing the Ethernet switches and adding a wall rack. Then he built a new server at his office and installed Windows Small Business Server 2003, configuring all the users before taking the machine to the Greensboro office, where he connected the personal computers to the new network. He made the old Novell server one of the peers on the network and Farlow identified the data files and folders that needed to be migrated to the new server. “I also had to reload three year’s worth of amendments to our accounting software packages,” says Farlow. “This took a bit of time, but overall, the whole process was pretty painless.”

Anderson agrees, “One thing I tell customers to allay their deployment and upgrade fears is that Microsoft has done a super job of making it extremely straightforward to set up and configure Windows Small Business Server 2003.”

Building a Network with Remote Access

After letting the new solution run in place for a month, Anderson and Farlow turned their attention to the satellite office and developed a plan to link the two. Anderson upgraded the personal computers in the same way he had for the main office, and established Remote Web Workplace (RWW) that comes with Windows Small Business Server 2003. This dynamically updated Web site provides CFC staffers in the remote office with a simple access point to all Windows Small Business Server 2003 network features, including the

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company intranet, Microsoft Office Outlook® Web Access (an Internet version of the Microsoft Office Outlook 2003 messaging and collaboration client) and Remote Desktop, which enables access to the desktop of their computer at work using the Internet. They can also access and use all CFC's tax applications residing on Windows Small Business Server 2003. Employees simply connect to RWW through a simple Internet address and enter their user ID and password on the RWW interface. Using this feature, staffers at the satellite office actually execute CFC's tax applications on the server in Greensboro, yet can print out tax returns on their local printers.

Anderson used the Remote Access Server Setup Wizard to configure the server to allow remote access using dial-in access through a modem because this would provide a better application performance than the other option, a virtual private network (VPN). He added a router at the main office and suggested that Farlow upgrade his Internet access to a 3 megabits per second (Mbps) digital subscriber line. He implemented a complex passwords policy and used Group Policy to manage the desktop.

“Remote Web Workplace was the key piece that provided a simple, cost-effective way to link the two offices,” says Anderson. “It also uses AEF data encryption to provide a very secure link. In fact, the American Institute of Certified Public Accountants has put its seal of approval on this particular type of protocol.”

Benefits

Windows Small Business Server 2003 has completely changed the way CFC does business. From a disjointed company that wasted money and time on duplication of services and poor intra-office communications, CFC now operates as a single, efficient business entity. Windows

Small Business Server 2003, with its reliable Windows Server 2003 operating system that includes network security, firewall technology, virus protection, and remote support, laid the foundation for a new paradigm in computing at CFC: more time spent on serving clients and less time on worrying about technology. Today, CFC is saving money, increasing revenue potential, working more productively, and improving customer service.

Saving Money, Increasing Revenue

Now that the two offices are functioning as one, CFC is achieving significant cost savings. Windows Small Business Server 2003 not only replaced the satellite office's inefficient peer-to-peer network, but also enabled secure remote access to all the company's line-of-business software in Greensboro. This meant that CFC did not have to spend an estimated U.S.\$7,500 to install a server in Archdale to achieve a client server network and it is also saving \$2,500 annually in the extra licensing fees.

“Windows Small Business Server 2003 is saving communication costs: an estimated U.S.\$4,000 in fax and telephone and courier expenses as well as my time driving back and forth every month,” adds Farlow. “When we began thinking about a new infrastructure of our network, we needed to make sure that we would save money over the long run. Windows Small Business Server 2003 more than repaid its cost with ongoing savings. And the remote access capabilities we now have are opening up new opportunities to increase revenue.”

CFC is using RWW to work more efficiently during the busy tax season, driving up billable hours and serving more customers. The company hired a CPA that works out of her home, approximately 100 miles away. Using RWW, she was able to assist CFC accountants so that the firm could complete more tax returns and take on extra clients.

The experiment was so beneficial that the company is contemplating using her services during the rest of the year, and even hiring more remote workers as needed. "With the Add User Wizard, setting up new client computers on the network is fast and easy," confirms Anderson.

The solution's flexibility to accommodate growth has already paid off as Councilman, Farlow & Co. is now in the middle of a merger that will double the number of employees. "The fact that we have Windows Small Business Server 2003 already in place has significantly reduced the upheaval this would have caused," says Farlow. "All we have to do is add the necessary concurrent access licenses, possibly add additional disk storage, and it's business as usual!"

Working More Productively, Improving Customer Service

During the upgrade, Farlow took the opportunity to begin working toward a paperless environment. He loaded three years worth of tax returns, monthly accounting records, and financial statements onto the server, so that now when a client calls, he no longer has to run to the filing cabinet. "We can also serve clients that live here, but go to our other office," adds Farlow. "Before I wouldn't even have their file in this office, and I would have to get it faxed or couriered over here, or refer them to a consultant in Archdale. Now anyone can answer any client's questions, no matter where we are located. That's got to make us look better to our customers."

Improved inter- and intra-office communications has also increased productivity at CFC. Farlow is saving approximately four hours a month driving back and forth to Archdale. Now instead of physically traveling to the other office to answer questions about a client, he can pull up any client in the system to confer with his

colleagues over the phone. He can also print documents that they need to see on their printers in Archdale without leaving his desk.

The Windows SharePoint Services technologies in Windows Small Business Server 2003 allow CFC to create a company intranet. Everyone is making use of the site to share documents and calendars and delegate tasks. For example, during the tax season, instead of faxing out tax updates and monthly newsletters, which are required reading for all employees, these documents are now available to everyone on the company intranet.

"Now my secretary doesn't have to bother me to check if I can make an appointment," says Farlow. "She checks my calendar and makes appointments for me. We are using the company calendar to post vacations, holidays, meetings, and company events. Our auditors use the company calendar to post when they visit clients on-site, so I know where everyone is during the day. That way, if a customer calls for a specific accountant, we can direct their calls to that person's cell phone."

And with the remote networking tools built into Windows Small Business Server 2003, Anderson at Business Information Services receives automatic e-mail messages in his office that track network status. Now he can fix networking issues before they become costly problems.

"The bottom line is we are working more efficiently, providing better service, and driving up revenue," concludes Farlow. "For CFC, Windows Small Business Server 2003 is the way of the future."

For More Information

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Windows Small Business Server 2003

Microsoft Windows Small Business Server 2003 is a powerful advantage for your business success. Improve the security of your data and help your network run dependably. Release new productivity from your desktops while empowering your employees to do more. And connect to your customers like never before.

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