



**JJ BURNS, AN \$800 MILLION
RIA, PARTNERS WITH AGIO
FOR MANAGED IT & MORE**

**JJ BURNS TURNED TO AGIO FOR BEST-IN-
CLASS IT SUPPORT, UNBEATABLE SERVICE,
AND SOLUTIONS TO THEIR EVOLVING NEEDS.**

PICTURE THIS...

You're an \$800 million independent registered investment advisor (RIA). Your current managed service provider (MSP) has been reliable in the past, but they were bought by a larger company and the service took a significant hit. Things aren't what they used to be.

When you call, no one answers. When you do get through, agents don't know who you are. They don't know this is the fifth call you've made about the issue let alone what solutions have been tried in the past. You give them the information again, but you have low expectations. There's no central point of contact so you're at their whim.

Even the easy stuff is overlooked. There are times you can't access your own wi-fi. Offboarding employees takes weeks. Need a password reset? Sorry, Charlie.

Your MSP's lack of responsiveness and transparency means you're handling a lot of the IT support. As you split your time between putting out fires and your day-to-day responsibilities of compliance and cybersecurity, it seems an awful lot like you're doing the job you're paying them to do. Frustration is high. It's time for a change.

So, you turn to Agio.

*IT WAS
TIME FOR
A NEW MSP.*



THE CHALLENGE

You have two options: stay put or find a new MSP to manage your IT. No one's ever crazy about migrating, but at this point, you're willing to take the risk. Staying with your current unresponsive MSP is exponentially more concerning than finding a new one.

The goal is simple: responsive end-user support across the board. You want an MSP who knows the RIA space and cares about you as much as you care about you. Someone who will proactively identify and mitigate risk so you can focus on your core business objectives without technology concerns holding you back.

You ask around and hear a lot about Agio and their experience in the RIA space. That sounds promising, but you're looking at other options and Agio is a bit more expensive than others. As you continue to evaluate your options, you're impressed with Agio's sales team. You've been

talking to someone with more than 15 years of experience in this space, and it's clear Agio is serious about financial services. You bring Agio on board. Later you see Charles Schwab, a \$7 trillion asset management company, lists them as a preferred vendor on their website. It's nice to know you've made a solid choice.

You're surprised Agio doesn't try to upsell you or put you in a box. Instead, they listen to you, understand your pain points, and are prescriptive in their solution. You're impressed with AgioNow, the proprietary portal where you can track the progress of the migration process. Transparency and accountability are built in.

Next, you're introduced to your Agio team, including your assigned customer success manager (CSM) who facilitates communication throughout the process and is your single point of contact for escalations.



**RESPONSIVE
END-USER
SUPPORT**



**PROACTIVE RISK
MITIGATION**



**TRANSPARENCY &
ACCOUNTABILITY**



THE SOLUTION

Everything is straightforward. Agio upgrades your network infrastructure, secures your end users with layers of cybersecurity technology, and, of course, ensures you have the service you deserve.

Agio manages Microsoft licenses, implements a patching schedule, and takes a proactive approach to identify and mitigate your risk. They find a few security holes—no password complexity or anti-virus—but the fix for that is built into the solution they're installing. Once that's done, you're onboarded to their 24x7x365 remote help desk.

There's one hiccup: as a surprise to no one, your current MSP is unresponsive to Agio's (and your) requests for information to complete the move. But Agio doesn't take silence for an answer and keeps moving forward.

They replace the equipment on loan from your previous MSP and install and configure a firewall, switch, access point, and UPS and includes those in the Agio Monitoring System (ASM) so they'll be monitored 24/7.

As promised, you've watched the entire process via AgioNow.



*AGIO DOESN'T TAKE
SILENCE FOR AN
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THE OUTCOME

You're relieved to find Agio addressed and alleviated your concerns and made the transition as seamless as it could be. It usually takes eight weeks to complete a support migration, but Agio knows the troubles you've seen and gets it done in six.

AgioNow has been an absolute game-changer. Not only does it provide complete transparency, once onboarded, you have the power to onboard and offboard employees yourself, in a day. You can change passwords at will. You can track tickets from report to resolution.

When you call, Agio knows you and they know your call history because it's all right there in AgioNow. What's more, they answer your call fast, and they're tenacious in their efforts to contact you when solutions are in place.

One of the biggest losses with your previous MSP was time. You spent your days as the go-to for critical issues in the moment. Now you spend your days focused on the business of cybersecurity and compliance. With Agio as a trusted partner, you gain peace of mind knowing your systems and data are secure, enabling you to dedicate your valuable time to high-impact initiatives that drive growth. You'd almost forgotten what relief feels like.



**SEAMLESS
& SPEEDY
TRANSITION**



**TRANSPARENCY
& CONTROL**

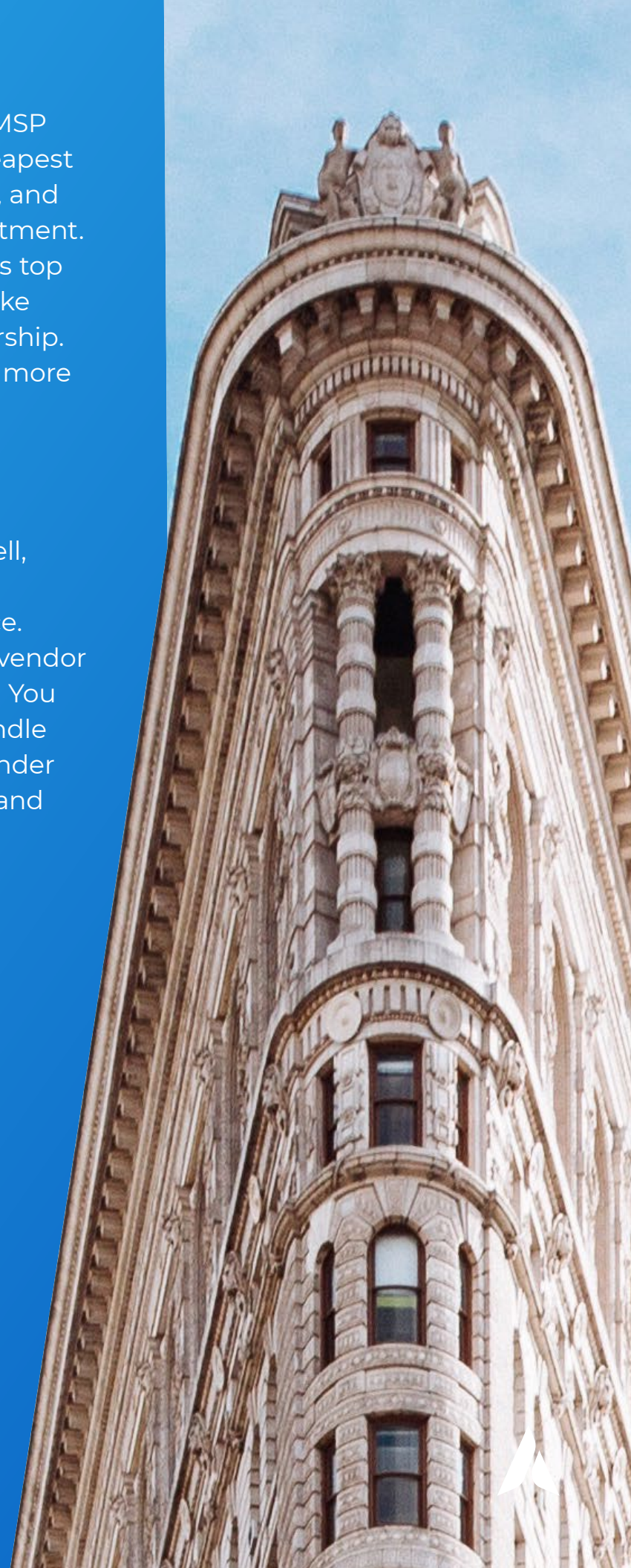


**FAST &
INTELLIGENT
SUPPORT TEAM**

You had shopped around for a new MSP and it's true that Agio wasn't the cheapest option. But you get what you pay for, and Agio showed they're worth the investment. At every turn, they kept your interests top of mind. Your relationship feels less like vendor/client and more like a partnership. You definitely feel like you're getting more than you're paying for.

Two words: blown away.

In fact, the entire process went so well, you've decided to expand services with Agio to include cybergovernance. Fragmented services mean another vendor to manage and slow response times. You trust Agio, and it makes sense to bundle managed IT and cybergovernance under one roof to get the tight integration and coordination you need.



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We couldn't be more impressed with Agio's commitment to understanding our unique needs and delivering tailored solutions. They are truly invested in our success and it shows through their dedicated teams and proprietary tools like AgioNow.

- JJ Burns
PRESIDENT & CEO



THE AGIO DIFFERENCE

Customer success is Agio's priority. They delivered dedicated support, transparency through AgioNow, and proactive solutions tailored to JJ Burns. It's a true partnership with exceptional value that exceeds expectations.

THE TAKEAWAY

Agio prioritizes service and partnership over simple technology solutions. By taking the time to understand JJ Burns' unique needs and challenges, Agio delivered customized support and tools that drive real business value, transforming the client experience.



WHY AGIO?

#OneAgio

When you select Agio, you're investing in a relationship with everyone who's a part of this firm. Our teams operate in a symbiotic relationship based on deposits and withdrawals, creating a vehicle for delivering more than just service. We deliver an experience that reaffirms to our clients that we've got them covered. From clean, concise implementations to consistent support backed by automation and tools that work how they're supposed to, value-add reporting, accurate, timely invoicing, and content on the latest IT and cybersecurity trends, we bring the full breadth and depth of our talent to bear. We deliver #OneAgio.

[Contact us today.](#)

