# NETGAIN

# Case Study:

## How Netgain Helped Aldrich Stabilize, Scale and Strengthen IT for Growth

When Dave Harris joined the Aldrich group of companies, the firm's systems were going down for hours during Aldrich CPAs + Advisors' tax busy season, and frustration was running high. As the new director of IT, he knew the problem wasn't the firm's applications. It was the unstable infrastructure underneath them.

"I couldn't even have process conversations because the systems were crashing," Dave said. "Continuing to ask our client service professionals to operate within those constraints was unsustainable for a growing firm, especially during filing deadlines."

Aldrich needed stability fast. And Dave needed a solution that met the needs of a 550-user CPA and wealth management firm with offices in the U.S. and India.

## From Fire Drill to Foundation

After trying another MSP to host its virtual desktop environment in Azure, the firm saw a temporary improvement, but costs kept rising, and the provider struggled with CPA applications.

"While there was some improvement, optimizing for the CPA environment was still an issue," Dave said.

## Aldrich

## Client Snapshot

**Firm:** Aldrich CPAs + Advisors

**Location:** Offices in the U.S. and India

**Size:** ~550 users

### Challenge:

Frequent system outages during busy season, lack of scalability and high costs from non-CPA-optimized hosting.

### Solution:

Netgain's co-managed cloud platform provides Aldrich with a stable, CPA-optimized environment designed for performance and scalability. The firm's internal IT team maintains day-to-day ownership of support and development, while Netgain manages hosting, platform operations and environment standardization through a unified "gold image." The model delivers consistency, reliability and the flexibility to support both U.S. and India teams seamlessly.

### Results:

Eliminated system outages during busy season, improved collaboration across U.S. and India teams and right-sized IT headcount from 16 to 12 while increasing output. Aldrich gained a stable, scalable IT foundation that supports growth and allows its internal team to focus on development and innovation instead of maintenance.

## A Collaborative Relationship

Like any long-term relationship, Aldrich and Netgain have refined how they work together. After some early adjustments, the two teams matured into a strong, collaborative rhythm.

"Now we're talking about how to make this a longer-term relationship," Dave said. "We solved the technical problems. Next, we want to better integrate our teams so it feels like one group working toward the same goals."

"Around this time, I went to a CPA conference in Puerto Vallarta with the goal of finding an MSP that could help fix this." Three months later, Aldrich went live on the Netgain platform. "It was an incredibly accelerated timeframe," Dave said.

**"We went from first conversation in February to implementation by July. We had to move quickly, and Netgain was able to deliver in a tight timeline."**

## Fixing the Root Cause

The initial rollout gave Aldrich stability, but the early environment wasn't yet built for scale. "Every one of our 50 servers was managed separately," Dave said. "That meant six people might have the same issue in one day, and no one could trace why."

Netgain and Aldrich spent the next year optimizing. The solution: a standardized "gold image" for all users, ensuring consistency, reliability and faster troubleshooting.

"That improvement made a huge difference," Dave said. "My team went from constant troubleshooting to focusing on how to deliver more value to the firm and support growth."

## Scaling Globally, Working Smoothly

Aldrich's technology footprint spans nine offices across the western U.S. as well as in India. Before the migration, the India teams were hit hardest by instability. Today, that's changed dramatically.

"The CPA president called me after we stabilized everything and let me know that our ability to leverage India has really grown," Dave recalled. "That was directly tied to solving the technology issues with Netgain."

## Refocusing the Team on Growth

With the platform stabilized, Dave's internal IT team was able to shift from maintenance to innovation.

**"Now our team is building automations, integrations and data solutions that actually add value to the business," Dave said. "We're not just keeping the lights on – we're helping the firm scale."**

# The Outcome

**Aldrich gained the stability it needed to focus on growth. The firm's technology team now operates proactively, not reactively. With a scalable cloud platform, consistent user experience and reliable support from Netgain, Aldrich can serve its clients and its global workforce without disruption.**

![Aldrich]

**"It's about having the headspace to focus on strategic work. We couldn't do that until the foundation was solid. Now it is."**