



New Direction is a trusted provider of self-directed IRA and HSA accounts that combine the tax advantages of these accounts with alternative assets ideally suited to individual investment goals.

## THE EXISTING LANDSCAPE

### INFLEXIBLE EXPERIENCES

On-premises, legacy systems weren't flexible, making remote work and adapting to pressures like COVID or natural disasters impossible without significant interruption.

### COMPLEXITY & FRUSTRATION

Lack of integration between systems drove significant complexity and frustration for employees, negatively affecting customer wait times.

### STRATEGIC SETBACKS

All of this kept IT Team members busy troubleshooting connections, bugs, and slowdowns instead of able to focus on more strategic ways forward.

## OUR STRATEGY

Working with PEI, New Direction selected a **FULLY OUTSOURCED MANAGED SERVICES PLAN** to allow their internal IT Team space to focus on more strategic needs for the business with insight from PEI to guide them.

**MANAGED SERVICES HELP LOCAL FINANCIAL SERVICES COMPANY GAIN IT INSIGHT**

How they Supercharged Business Efficiency

## THE RESULTS

New Direction has seen an **INCREASE IN CLIENT SATISFACTION** and retention and **EXPERIENCED NO INTERRUPTIONS** to their business during and after a local natural disaster



### UNBURDENED IT TEAM

User helpdesk and system administration tasks were offloaded to PEI. Natural disasters mean no interruption for users or significant burden on the IT team.



### STRATEGIC ROADMAPMING

The team's increased bandwidth coupled with vCIO strategic planning meant they could create a roadmap for improving inefficient systems.



### AGILITY REALIZED

New Direction worked with PEI to migrate to an agile, cloud-based infrastructure that allows for systems integration, automation, and seamless moving between tasks.