

Worldox CompleteCloud is a complete hit at Cole Valley Software.



By **Peter Shaw**, CEO
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Challenge:

To find a hosted desktop with the applications we need, and with the flexibility to control our own development and testing servers.

Solution:

The new Worldox CompleteCloud hosted desktop solution – even includes the hosting of our own Contact Ease CRM application.

Result:

A seamless, error-free transition from the previous hosting provider, with enhanced disaster recovery and significantly reduced IT costs.

“With CompleteCloud, we would still be able to control our own servers and use the applications we already had, while gaining a more robust system.”

As CEO of a legal software company, I have a responsibility to provide our employees with the tools that they need to accomplish their goals while also managing the bottom line. We have 15 employees and a lot of work to do, so efficiency is of the utmost importance. As you can imagine, the reliability and performance of our technology infrastructure is crucial, because we are in the technology business.

Recently, we decided to make a change with our hosted desktop provider. Given the distributed nature of our environment, we decided that it is much more cost effective for us to operate in a hosted environment where we don't have to maintain our own IT infrastructure. Previously, we had been subscribing to a software-as-a-service platform which had been working, but it had too many limitations.

We needed a solution that would include the applications we needed, and the flexibility to have control of our own servers for development and testing purposes. Naturally, we also wanted the breadth of IT services a hosted solution provides, including complete infrastructure management, upgrades and backups.

We have been using Worldox as our company-wide document management system for the past two years. Everyone loves Worldox because it is easy to use, effective and relatively problem-free to manage on an ongoing basis. We actively use Worldox to archive Outlook emails and have all of our document creation, use and distribution run through Worldox.

Our Worldox reseller, Bill Baker of California-based Baker+Cadence Solutions, had always been a great resource for us in the industry, so we contacted him. Bill told us about the new Worldox CompleteCloud hosted desktop, which combined Worldox integrated with Outlook/Exchange, Microsoft Office Suite and QuickBooks for an all-inclusive monthly subscription price.

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They were even able to include hosting our own *ContactEase* CRM application within their environment. With *CompleteCloud*, we would still be able to control our own servers and use the applications we already had, while gaining a more robust system.

In September 2011, we decided to subscribe to the Worldox *CompleteCloud* service. The preparation and planning required just a few hours over a 20-30 day period. The Baker team worked with Worldox technical support to lay out the process, including coordinating with our prior hosting provider to transition off of their system.

Baker+Cadence and Worldox were ahead of schedule on everything and they reached every milestone. They resolved issues quickly. The people we worked with were delightful, and we had friendly, positive open communication throughout, which makes it easy to do business. Lots of companies say that they pay attention to customer service, but these people actually deliver. I have to say that I have been involved in several IT transitions and upgrades, but none have ever been as seamless as this. Users came in on the Monday after the software and data was transitioned from our previous provider over a weekend and everything just worked. Frankly, we anticipated problems and had developed contingency plans in case there were issues, but we didn't have to use them. Everything was perfect!

We are up and running with Worldox *CompleteCloud* and we have a backup schedule that is rigorously maintained by the hosting provider, so we don't need to worry about disaster recovery. Best of all, by using Worldox *CompleteCloud*, we were able to avoid adding headcount for an in-house IT person, which definitely helped our bottom line.

Worldox *CompleteCloud* is serving us well and Baker+Cadence and Worldox technical support are standing by in case we have any issues. Basically, Worldox *CompleteCloud* is a complete hit at Cole Valley Software; I would recommend it to any company looking for a trouble-free hosted solution.