



Cutting-Edge Tax Firm Makes the Numbers Work with Windows Small Business Server 2003

Microsoft Windows Server System

Case study

“Our clients expect us to be at the leading edge of our tax practice, which means we must be at the leading edge of technology as well. Windows Small Business Server 2003 gives us the business IT platform we need to deliver first-rate services to our clients.”

John Curzon
Partner
Curzon, Cumbey, & Kunkel, PLLC

CURZON, CUMBEBY & KUNKEL, PLLC

By upgrading to Microsoft Windows Small Business Server 2003 from its previous client-server system, accounting firm Curzon, Cumbey & Kunkel, PLLC fine-tuned its IT system, and expects to gain greater operational efficiency and forge stronger client relationships. Remote Web Workplace provides secure, business-critical connectivity from remote locations including client offices. The group scheduling capabilities of Microsoft Exchange Server 2003 technology promotes individual and group productivity. The speed and security of Microsoft Windows Server 2003 technology will help the firm use specialized tax-related business application more efficiently, process tax returns more rapidly, and spend more time with their clients. The firm expects that these benefits will have a positive effect on its 20 percent growth projection.

CUSTOMER PROFILE	BUSINESS SITUATION	SOLUTION	BENEFITS
Oklahoma-based Curzon, Cumbey & Kunkel PLLC offers broad industry experience and extensive financial, tax, and operational expertise that helps client businesses become more efficient and profitable. The company offers traditional tax, auditing, and accounting assistance as well as business valuation, financial, and advisory services.	Curzon, Cumbey & Kunkel already make extensive use of information technology. However, the firm wanted to increase their competitive advantage by upgrading its client-server network based on Microsoft® Windows NT® Server version 4.0 and Microsoft Exchange® Server version 5.5 to one based on the new generation of Microsoft Windows Server™ and Exchange Server software.	Microsoft Gold Certified Partner Computer Technology Solutions implemented a business solution based on Microsoft Windows® Small Business Server 2003. <ul style="list-style-type: none"> Microsoft Exchange Server 2003 technology improves e-mail and group scheduling capabilities Microsoft Windows SharePoint™ Services provides dedicated Web-based team collaboration sites. Remote Web Workplace provides secure remote file access and systems maintenance. 	<ul style="list-style-type: none"> Less time spent setting up client meetings Quicker, more secure remote access to e-mail messages, business data, and client files Personal productivity improved by group calendaring Group productivity improved by Web-based team collaboration capabilities Reduce support costs enabled by remote server maintenance User downtime and costs of lost information reduced by quicker, safer file restoration

“Our most significant cost is our time. Small Business Server 2003 should save enough time to pay for itself within six to eight months. But the real excitement is being able to do our jobs in better ways and bring real value to our clients’ businesses.”

Terry Cumbey
Partner
Curzon, Cumbey & Kunkel, PLLC

Situation

Curzon, Cumbey & Kunkel PLLC knows how to optimize the use of information technology to maintain the lead in tax counseling services to small and medium-sized businesses.

The firm made an early commitment to a paperless office, uses Internet-based research tools to keep current on tax and related issues, and uses specialized electronic forms for all accounting tasks. Each professional involved in the firm’s tax practice uses two monitors, a capability first enabled by the Microsoft® Windows® 98 client operating system. The expanded desktop enables accountants to review electronic client records on one monitor while they use the other monitor for processing the tax information within the specialized tax application. The expanded desktop also improves the user’s workflow processes such as e-mail messaging and scheduling tasks with the Microsoft Outlook® messaging and collaboration client.

As an early adopter of client-server computing, the firm ran a legacy network that was based on Microsoft Windows NT® Server version 4.0 operating system. The system also hosted a specialized tax and accounting application and Microsoft Exchange® Server 5.5, which was used only for internal e-mail messaging and relied on an Internet service provider (ISP) for POP3-based e-mail. However, this infrastructure no longer provided the advanced technology the firm needed to keep abreast of changes in their industry—changes, which enable them to deliver leading-edge services to their clients.

The firm’s IT managers knew that to provide their clients with comprehensive and up-to-date services, they needed to step up to the most current communications, collaboration, file

sharing, remote access, group scheduling, and data recovery technologies available.

Solution

By consulting with Computer Technology Solutions (CTS), a Microsoft Gold Certified Partner, and reviewing the advantages of an upgrade, Curzon, Cumbey & Kunkel chose to upgrade to a server solution based on Microsoft Windows Small Business Server 2003, which includes these technologies:

- **Windows Server™ 2003** technology provides the firm with the latest, most secure and reliable Windows Server operating system. The Active Directory® directory service of Windows Server™ 2003 and Group Policies enable the firm’s IT staff to set and enforce remote data access and other IT administration rules quickly and efficiently.
- **Windows SharePoint™ Services**, a service of Windows Server 2003, provide the firm to establish Web-based team workspaces that promote better collaboration about client issues.
- **Remote Web Workplace** provides partners and employees with secure and reliable remote access to client data on their desktop PC while they are out of the office.
- **Microsoft Exchange Server 2003** technology provides unified messaging and group calendaring capabilities with free-busy scheduling that the firm needs to keep in touch with clients and stay informed of changes in tax and other issues.



- **Shadow Copy of Shared Folders** provides an easy file restoration process that helps the firm to easily and simply recover files that are accidentally deleted.
- **Windows Shared Fax Service** extends the firm's communications capabilities by enabling employees to send faxes from any Internet-enabled PC.

One important measure of the firm's productivity is the time it takes to process tax returns. Partner Terry Cumbey said, "Our most significant cost is our time. Small Business Server 2003 should save enough time to pay for itself within six to eight months. But the real excitement is being able to do our jobs in better ways and bring real value to our clients' businesses."

Benefits

The Windows Small Business Server 2003-based solution provides the firm with a complete business IT solution at a price that was easy to justify.

Connecting with Clients. The ability to spend time onsite with clients is a vital component of ensuring superior client service.

Before deploying Windows Small Business Server 2003, accessing client or tax-related information from a client's office was not a realistic option. Now, the firm's partners can simply use Remote Web Workplace by using dialup or broadband connections and access e-mail or client information quickly and securely from any location out of the office. The firm's partners expect that having client-specific information literally at their fingertips during onsite visits will help them extend the value of their services and contribute to an estimated 20 percent new business in the next year.

Secure remote access to files enabled by Remote Web Workplace also helps the

firm keep current with their work and client relationships whenever they work at home or while traveling.

Microsoft Office Outlook Web Access, the Web-based e-mail client of Exchange Server 2003, also keeps the firm and clients connected by providing messaging services from any Internet-enabled connection. Partners and client-facing employees can now access e-mail messages easily while they visit clients or travel, saving critical time compared to their previous system. This capability helps the firm to stay in contact with clients more consistently and enables the firm to improve client service.

Working Smarter and Faster. As part of the McGladery Network of accounting firms, Curzon, Cumbey & Kunkel must stay abreast of business tax issues so that they can be knowledgeable and responsive to their clients. But fine-tuning the IT capabilities of a firm as technology-savvy as Curzon, Cumbey & Kunkel was a challenge for CTS.

However, when the firm's partners and IT Manager Kathy Kuntz became familiar with the capabilities of the new Windows Small Business Server 2003 solution, it didn't take them long to identify the advantages that made upgrading from their previous system simply a matter of time:

- The group scheduling and messaging features of Exchange Server 2003 can reduce the time and effort that employees spend setting up meetings and staying in touch with colleagues and clients, which promotes better client service.
- Shadow Copies of Shared Folders reduces user downtime (compared with restoring data from tape) and the costs associated with lost data.
- Remote Web Workplace increases individual productivity by reducing

Software and Services

- Microsoft® Windows® XP Professional
- Microsoft Windows 2000 Professional
- Microsoft Windows 98
- Microsoft Office XP
- Microsoft Office 2000
- Microsoft Office Outlook® 2003
- Microsoft Windows Small Business Server 2003
 - Microsoft Windows Server 2003
 - Microsoft Exchange® Server 2003
 - Windows Terminal Services
 - Windows SharePoint™ Services
 - Microsoft Shared Fax Service

Hardware

- Small Business Server 2003 running HP ProLiant ML350, dual Intel Xeon 2.8 GHz with 4 x 256 MB RAM and 4 x 72 GB of hard drive memory with RAID Smart Array 5302/128
- 5 desktop Dell Dimension PCs, Celeron 500 MHz with 256 MB RAM and 20 GB hard drive running Windows XP Professional
- 2 desktop Dell PCs, Pentium 4, 1.4 GHz with 128 MB RAM and 20 GB hard drive running Windows XP Professional
- 2 laptop Dell PCs, Pentium II and III with 256 and 512 MB RAM and 10 and 20 GB hard drives respectively running Windows XP Professional running on Windows XP Professional.
- 5 desktop Compaq EVO D500, Pentium 4, 1.5 GHz with 256 or 384 MB RAM respectively with 40 GB hard drive





the time and effort that the firm's client-facing partners spend accessing client-related information during client visits.

- The Active Directory directory service and Group Policies reduce the costs of remote access authentication and other routine and IT administration tasks.

Now, the firm will enjoy the benefits of quick, secure access to their specialized

line-of-business tax and financial applications, improved collaboration, the ability to schedule meetings internally or with clients, and fax information directly to a client from a user's PC.

CTS also appreciates that daily server performance reports can be e-mailed to them automatically, enabling them to easily check performance levels that help them fine-tune the server remotely.

Windows Small Business Server 2003 helps your small business to be more productive with fewer resources. Now you can:

- Protect your business information automatically in 15 essential ways.
- Get 20 percent more done every day by making it easier for your employees to find, share, communicate, and remotely access information.
- Reach more customers and serve them better, 24 hours a day, 7 days a week.
- Set up quickly and easily operate a Windows Server system to run your small business.

For more information about Windows Small Business Server, go to: <http://www.microsoft.com/windowsserver2003/sbs>.

For More Information

For more information about Microsoft products and services, call the Microsoft Sales Information Center at (800) 426-9400. In Canada, call the Microsoft Canada Information Centre at (877) 568-2495. Customers who are deaf or hard-of-hearing can reach Microsoft text telephone (TTY/TDD) services at (800) 892-5234 in the United States or (905) 568-9641 in Canada. Outside the 50 United States and Canada, please contact your local Microsoft subsidiary. To access information using the World Wide Web, go to: <http://www.microsoft.com/>

For more information about Curzon, Cumbey, and Kunkel services, call (918) 491-4036 or visit the Web site at: <http://www.cckcpa.com/>

For more information on CTS, a Microsoft Gold Certified Partner, call (918) 622-1167 or visit the Web site at: <http://www.ctshq.com/>

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