

## CHALLENGE

Upgrading tech services to increase collaboration and enable remote work capabilities

## SOLUTION

Remote Workforce Solutions  
Managed IT Services

## INDUSTRY

Insurance

## SITUATION

Legacy Brokers initially needed more consistent IT services and help addressing challenges around functionality, training and documentation. The company also wasn't sure how to get the most value and efficiency out of its Microsoft Office 365 licenses.

Initially, AdamsGabbert (AG) worked with Legacy Brokers to understand how they wanted to use technology to achieve success, but once the COVID-19 pandemic broke out, CEO Rick Finfera knew his company also needed AG's help to quickly transition to a work-from-home model.

## SOLUTION

After performing an IT assessment, AG helped Legacy Brokers migrate from its historical email provider to O365 and implemented OneDrive and SharePoint for storage and better online collaboration. When the time came to keep employees home, healthy and productive, AG worked quickly to establish a VPN router at the Legacy Brokers office, purchased hardware, configured internal apps and VPN connectivity for server access, and trained employees to physically set up their equipment at home.

AG helped Legacy Brokers get even more out of Microsoft Teams, setting up individual teams and private channels to allow specific access and secure file exchange with external agents while ensuring privacy and compliance within the organization.

## RESULT

Finfera said that AG "seamlessly implemented the online collaboration software we needed to work remotely in just a couple of days." Now Legacy Brokers is able to conduct business – everything from video meetings and sharing and editing documents in real time to winning new business – all from the safety of their homes. AG continues to proactively reach out to the team to monitor their IT needs and promptly resolve issues. Finfera applauds AG for its ability to partner side-by-side with his team, respond rapidly and get ahead of any problems that may arise.



**“Having the ability to reach them in real time was everything. They moved at the pace I wanted to move. Everything, from start to finish – it’s been one team. It’s been seamless.”**

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*Rick Finfera, CEO, Legacy Brokers*

## ACCELERATE TOGETHER.

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