

## Client Spotlight



**Company Name:**  
Gift CPAs

**Name & Title:**  
Jesse Lambert, Partner

**Location:**  
Mechanicsburg, PA

**Industry:**  
Financial Services



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## Tax Season Just Got Easier: IntermixIT Uses Technology To Create Streamlined Accounting Processes And Better Security Measures For The Team At Gift CPAs

**P**icture this: it's tax season, you're a Certified Public Accountant working 60-70 hours a week, up against the strictest deadlines there are in the industry, and your computer stops working for an entire day. It's a reality that seems overwhelming and unmanageable for the common person, but for seasoned CPAs, it's an occupational hazard that they must plan for. By partnering with a managed service provider, CPA firms can prevent downtime and address technical issues with ease, making tax season and busy cycles smoother than ever.

Gift CPAs is an accounting firm that has been serving small businesses in Pennsylvania for 40 years. In those 40 years, the firm has grown from one office location to five, from a few accountants to a team of 50–60 depending on the season, and from a paper-centric recordkeeping system to a computer-based approach. “Once we jumped from one location to multiple, it became abundantly clear how piecemealed our IT infrastructure was,” recalled Jesse Lambert, a partner at the firm. “Our previous IT providers were more reactive than proactive, and our ability to grow was hindered because of it.”

Lambert and the other partners at the firm decided that if Gift CPAs was going to grow as planned, a new approach to IT was crucial. While they were interviewing a handful of MSPs, a contact from a previous provider highly recommended IntermixIT’s services. “The person making the recommendation was always honest with us, and we really trusted his opinion, so we gave IntermixIT a call,” said Lambert.

In no time at all, IntermixIT was sitting down with Jesse and the rest of the team at Gift CPAs to learn about their business goals, understand their current IT infrastructure, and chart a path forward. That was five years ago. Since then, Gift CPAs has acquired multiple accounting firms, expanded to five locations in Pennsylvania, and bolstered their technology capabilities across the board.

### **Growing Together: Expanding The Infrastructure**

From the get-go, IntermixIT focused on helping Gift CPAs reconfigure their internal IT setup. The firm was running Remote Desktop Services (RDS) with an added layer on top through Citrix. The team at IntermixIT found that the Citrix product wasn’t necessary for Gift CPAs: it was slowing down the RDS, wasn’t adding much functionality, and was costing a pretty penny each month. Immediately, IntermixIT was identifying cost-saving measures without jeopardizing security or functionality. “That was a great way to start. We’re accountants, we love to save money,” joked Lambert.

Even with the Remote Desktop Services operating without an added layer, the virtual machines that the accountants relied on were being overextended. “We didn’t know why our VMs were slowing down, but IntermixIT helped us identify and solve the root issue,” explained Lambert. After the RDS was split between two separate virtual machines, computers were running faster, programs were working more smoothly, and tax season was better supported.

### **Optimizing Together: Software Assessments**

Like most CPA firms, the team at Gift CPAs uses a number of different software solutions to serve every client and run the business. Whether it’s a new accounting tool or a customer relationship management solution, IntermixIT conducts assessments on new SaaS products that are entering the operational ecosystem. When Jesse or his teammates find a new platform to incorporate into their business, IntermixIT runs the technical pieces of the integration.

“We have an application that we’re onboarding now,” detailed Jesse. “It’s a pretty major conversion that’s going to replace 3–4 of our current programs and set us up with a central hub.” This new platform has been in the works for more than a year, and it’s transformational for the day-to-day accounting operations, but the final piece of bringing this transformation to life depends on IntermixIT. Not only do they have to understand the technical impact of new systems but they also need to ensure the security of any new tool measures up without a doubt.

As a frontline defender against cyber threats, IntermixIT plays a critical role in ensuring the business is operating in a healthy, secure state. “One of the things I appreciate most about IntermixIT is their knowledge when it comes to cybersecurity,” shared Jesse. “They are top-notch when it comes to security matters.” Beyond assessing individual platforms, IntermixIT has set a standard that includes two-factor authentication, password management, and cybersecurity training for all Gift CPAs employees.

### **Working Together: Forging A Partnership**

Having an MSP that can effectively move technical priorities forward is one thing, but having an MSP that is always responsive and can prioritize your business needs is another. During tax season, when the accountants at Gift CPAs are in the most challenging period of their year, they know that IntermixIT will put them at the top of the list when issues arise. “We can’t have downtime, especially during tax season, and IntermixIT takes that just as seriously as we do,” said Lambert.

With high retention rates, IntermixIT has a deep resource pool of technicians who are familiar with the unique demands in the accounting space and well-acquainted with the business goals of Gift CPAs. The partnership provides the leadership team at Gift CPAs with added peace of mind because they know that IntermixIT is proactively looking out for the best interests of the organization. “I trust them to do well for us, and that’s pivotal,” Jesse said.

### **Acquiring Together: Managing Integrations**

With many acquisitions in the past, and more on the horizon, ensuring a seamless integration between organizations is about so much more than gaining more employees or converging two reconciliation processes. “Our systems have to be able to work together,” explained Lambert. “Until everything is running smoothly, IntermixIT manages both systems, helps us bring them together in the back end, and assists our accountants with troubleshooting any issues during an acquisition.”

Tax season will always be chaotic, mergers and acquisitions will always consist of trials and tribulations, and data accuracy will always be a top priority. But the things that are constantly changing are the technologies that exist within tax season, the systems that support data accuracy, and the integrations needed for growth. And no matter how those items change, IntermixIT is ready. Ready to enable growth. Ready to improve efficiency. Ready to strengthen security.

If you want to learn more about an MSP that is ready for everything, **visit [www.IntermixIT.com](http://www.IntermixIT.com)**.