



AT A GLANCE

What they wanted to do:

- Sustain rapid growth and share best practices across dispersed offices
- Provide better information and services to clients
- Obtain a more cost-effective collaboration suite

What they did:

- Launched Google Apps to share information among staff and clients
- Started with collaboration while planning for mail

What they accomplished:

- Integrated data flow for one-fifth the cost of other solutions
- Improved collaboration among staff and clients
- Accurately accessed the right data when they needed it



Fast-growing financial outsourcer streamlines online collaboration, cuts costs by 80% with Google Apps Premier Edition

Business

When companies need executive-level financial management to move business forward, they often turn to TechCFO. Founded in 2003, TechCFO (www.TechCFO.com) is a team of seasoned Chief Financial Officers (CFOs), controllers, and accountants who work with clients to help them with strategic planning, capital strategy, fundraising, accounting, and other financial needs. TechCFO's strategy of providing outsourced financial management services is paying off in the form of expansion – since its founding, TechCFO has grown rapidly, with offices across the United States.



Brain trust

TechCFO's core asset is the cumulative expertise which its seasoned financial professionals offer to clients. With 14 partners – all CFOs with 15 to 20 years of experience – the firm's value revolves around the knowledge of the entire team: the firm's collective intellectual capital. That means that it's a competitive prerequisite for everyone in the firm to be able to share knowledge – and the documents that contain it. Because TechCFO's professionals are dispersed around the country, it's essential for them to be able to share information online. As the firm grew, the team knew that it needed a better way for the partners, and additional staff to easily, securely exchange ideas and expertise.

“We want our clients to benefit from the varied experience of all of our partners – not just the one assigned to their account,” explains Neal Miller, partner at TechCFO. “When partners see something they have never dealt with before, they serve clients better by tapping into the expertise of all of our seasoned CFOs.”

Intranet
Accelerate the Vision.

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 Item added by Mandy Walker
 Item added by Todd Guthrie
 Item edited by Todd Guthrie
 Item added by Veronica Parker
 Item added by Fred Baumbach
[Jason Scherr](#)
 edited by Jason Scherr
[Eric Froistad](#)
 edited by Eric Froistad
[Company Directory](#)
 Item added by Jennifer Gibson
 Item added by Daniel Wykoff

Home
Welcome to the TechCFO intranet!

All of our company information will be posted on this site. From here you can read [company announcements](#), access our [document repository](#), view important [Human Resources](#) information, and maintain our work product for each client at the Client Sites.

If you have any suggestions, please email our Google Site administrator, [Neal Miller](#).

Recent Announcements

- [Welcome Jonathan Thomson!](#) Jonathan Thomson joins TechCFO as a Director. Jonathan most recently spent 2 years as an investment banking associate with Morgan Keegan. Prior to that, he was FP&A Manager at ...
Posted Feb 12, 2009 8:40 PM by Neal Miller
- [Welcome Jennifer Gibson!](#) Please join us in welcoming Jennifer Gibson! Jennifer joined TechCFO on February 1, 2009.
Posted Feb 3, 2009 2:51 PM by System Administrator
- [Welcome John Simonelli!](#) Welcome to John Simonelli who joined TechCFO on January 1, 2009.
Posted Feb 3, 2009 2:49 PM by System Administrator

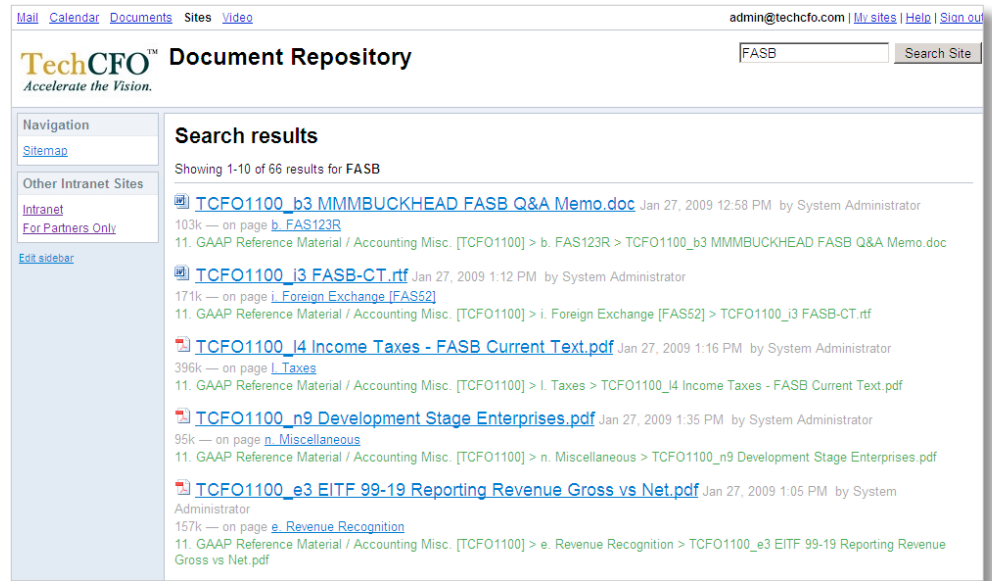
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NEW! [Download the TechCFO Intranet & Google Sites training materials](#)

TechCFO Calendar
 Today March 2009 [Print](#) [Week](#) [Month](#) [Agenda](#)

Sun	Mon	Tue	Wed	Thu	Fri	Sat
Mar 1	2	3	4	5	6	7
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Events shown in time zone: Eastern Time [Google Calendar](#)



The firm's growth fueled the need to share information and best practices in any easily-available way. "As we expand, we need to be able to tell newcomers, regardless of their locations, 'You're not alone.' We want them to know that they have information to help them deliver services to clients quickly and professionally," says Miller.

In 2008, TechCFO began to address this need, collecting intellectual capital across the entire company – but digitizing and centralizing it turned out to be a major undertaking. The team worked to gather and publish 700 key internal documents to public folders on the firm's hosted email system. But results were disappointing. "Our hosted solution was slow, clunky, and difficult to search," he says. "Partners had to know in advance where to look for a particular document. Overall, it wasn't really functional."

Online collaboration made easy

Then, in December 2008, Miller attended a seminar hosted by Google and Cloud Sherpas – well-known Google Apps Authorized Resellers – and learned about Google Apps Premier Edition. One of the hands-on demonstrations showcased Google Sites, a service included with Google Apps that lets users easily publish file attachments, free-form content, rich media, and other information to a website.

Miller says he was struck by how simply Google Sites would solve TechCFO's dilemma. It would allow the company to collaborate online cost-effectively and securely, without adding hardware and complexity to TechCFO's IT mix. Partners across the firm would be able to access permission-protected information, and would be able to add content to the online repository without needing to know HTML or other programming languages. The firm saw Google Sites as a rich tool set that would improve communication and collaboration across the firm – and as the perfect way to get started with Google Apps as they planned a phased migration to additional functionality. "I saw that Google Sites and Google Apps were really perfect for us, especially because we could leverage Google's search capability to help our staff efficiently find relevant information," Miller recalls.

Based on cost-efficiency, ease-of-use, and powerful search, Miller pitched Google Apps to his partners and they all agreed to move forward. The firm targeted Google Sites as a key solution for implementation by early 2009, when new office openings

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Neal Miller
Partner

meant that incoming partners would quickly need access to business information online.

TechCFO worked with Cloud Sherpas to streamline deployment and training, guided by Cloud Sherpas' five-step methodology for implementing Google Apps Premier Edition: planning, configuration, implementation, optional steps like data migration, training, and support. Using this model, TechCFO's deployment went smoothly, minimizing interruptions to normal business operations. To migrate TechCFO's 700+ document repository, Cloud Sherpas developed the Google Sites Bulk File Uploader, an automated tool that uploads files into Google Sites and preserves the folder hierarchy with nested Google Sites file cabinet pages. “Cloud Sherpas did an exceptional, methodical job,” says Miller. “From start to finish, the process took only about three weeks. I'd call that rapid deployment.”

Training was similarly painless. After a two-hour remote training session hosted in Atlanta, with partners and others participating online, the entire team successfully logged in, searched the new site, and even set up their own online pages for collaboration with clients. Cloud Sherpas also developed a short primer on the site to help staff with subsequent questions.

In addition to their growing knowledge base, TechCFO uses Google Sites for its company intranet, making it easy to access information on company benefits, frequently used content, and more. The team also leverages Sites to build customer-facing collaboration sites for sharing large documents. “With Google Sites, TechCFO has been able to deliver a range of online tools very quickly,” says Cloud Sherpas' CEO Michael Cohn. “It's been satisfying for us to help them use Sites as a valuable component of a broader Apps deployment.”

Helping others help themselves

Partners immediately, easily began using Google Sites to create new web pages for sharing information with clients. The team has been able to publish substantial quantities of information online, thanks to the storage capacity included in Google

The screenshot shows a Google Sites intranet for TechCFO. The page title is "401k/Profit Sharing" under the "Human Resources > HR Forms >" category. The page content includes eligibility criteria, plan components, and a list of documents. The left sidebar contains navigation links like Home, Human Resources, Offices, Company Directory, and Sitemap, as well as "Other Intranet Sites" and "Recent site activity".

401k/Profit Sharing

Eligibility in the TechCFO 401K/Profit Sharing Plan is limited to employees who work a minimum of 1000 hours and are employed on the last day of the calendar year. Employees may choose to participate in the voluntary deferral portion of the 401K plan and defer pre-tax monies, without any service limitations.

The 401K/Profit Sharing Plan has 3 components:

1. Voluntary 401K pre-tax deferrals by employees.
2. A Safe Harbor contribution of 3% of eligible compensation annually, subject to the hours of service and year end employment limitations.
3. A Profit Sharing contribution computed annually based on the actuarial calculations of all the participants.

To participate in the plan, an employee should submit the 401K Enrollment and 401K Beneficiary forms to accounting@techcfo.com. Once enrolled, you can view and manage your account and investments online. Open the Web Brochure document for instructions on how to establish and use your online account.

Please review the Summary Plan Description for specifics of the plan.

File Name	Size	Version	Date	Author
2009 Safe Harbor Notice.pdf	27k	v. 1	Feb 10, 2009 3:25 PM	Neal Miller
401K Plan document effective 010108.pdf	354k	v. 1	Feb 11, 2009 10:21 PM	Neal Miller
Irrevocable Election not to participate.doc	41k	v. 1	Feb 10, 2009 3:22 PM	Neal Miller

ABOUT CLOUD SHERPAS



Cloud Sherpas (www.cloudsherpas.com) is a cloud computing systems integrator and application developer. As a leading Google Enterprise partner, Cloud Sherpas helps organizations leverage Google Apps and Google App Engine to dramatically reduce IT expenses. The company delivers deployment, change management, support and development services to commercial, enterprise and educational institutions seeking to adopt cloud computing. Cloud Sherpas is a Google Apps Authorized Reseller and enterprise deployment partner.

ABOUT GOOGLE APPS

Google Apps offers simple, powerful communication and collaboration tools for enterprises of any size in business, education, or government – all hosted by Google to streamline setup, minimize maintenance, and reduce IT costs. With Gmail, Google Calendar, and integrated IM, users can stay connected and work together with ease, even in private domains. And, using Google Docs, which include word processing, spreadsheet, and presentation tools, they can share files and collaborate in real-time, keeping versions organized and available wherever and whenever users work.

For more information, visit
www.google.com/a

Sites. This has been particularly beneficial for TechCFO because partners often share financial models contained in large spreadsheets. “We used to bog down everybody’s inbox with our files,” says Miller. “Now we just post them to our Google Site and give clients permission to access them. It’s a much more effective solution.”

TechCFO is also pleased with the cost of Google Apps. Miller notes that the firm was able to implement Google Apps for considerably less than the expense estimated in their original plan. “Other online collaboration solutions alone would have cost four to five times the annual cost of Google Sites, yet with Sites we also got the full functionality of Google Apps,” says Miller. “We’re CFOs, so by nature we appreciate the cost savings.”

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Moving forward, TechCFO plans to roll out the other portions of Google Apps, starting with Gmail. The experience with Google Sites has given the firm a cost-effective online collaboration tool and a launching pad for rolling out the other powerful services in Google Apps. Miller projects that the cost and productivity benefits will only multiply when the firm is using Google’s full suite of communication and collaboration tools. “On a relative spend basis, what we pay in two months for our previous hosted email will cover a full year for the entire Google Apps suite,” says Miller. “That’s a major benefit for us.”

