



# Leading accounting and advisory firm heightens client satisfaction with more predictable application performance

## Citrin Cooperman improves operational efficiency and IT service quality with Unity EdgeConnect SD-WAN edge platform

When working with an accounting and advisory firm, you count on trust and integrity. After all, your current and future financial wellbeing are on the line. That's why, since 1979, businesses and individuals have put their trust in Citrin Cooperman.

In its 40 years of steady growth and expansion, Citrin Cooperman has never lost sight of its core mission: to focus on what counts. This comes through in the care with which staff handle every account, as well as the underlying technology they rely on to deliver integrated services and intelligent insights.

Joe Persells, director of information technology, has a clear view of how technology impacts the business. "We are continually researching and evaluating the latest innovative IT solutions that will enable us to deliver better client satisfaction and value," he states.

Lately, Persells and his team have been centralizing the IT infrastructure into a single data center, and exploring opportunities with Microsoft Azure as part of a longer-term hybrid cloud strategy. The goal is to improve IT efficiency and service quality to enhance client satisfaction. Central to this effort is a



SUBSTANTIAL  
COST SAVINGS



UP TO 30%  
LOWER LATENCY



20X MORE  
BANDWIDTH

software-defined wide-area network (SD-WAN) built on the Silver Peak [Unity EdgeConnect™](#) SD-WAN edge platform.

## Performance, predictability, and reliability to delight clients

Persells was not new to Silver Peak. For years he used virtual WAN optimization software from Silver Peak to accelerate data replication for disaster recovery. This shrunk the time to complete replications from an entire day to just one hour, which enabled the firm to recover quickly from a system crash, saving huge amounts of time and money.



**Our accountants and advisors are much happier with the quality of experience since moving to the Silver Peak SD-WAN. And we're able to respond faster and more efficiently to clients because everything works better."**

— Joe Persells, Director of IT, Citrin Cooperman

This positive experience steered Persells to Silver Peak again as the IT centralization project exposed problems with the firm's aging MPLS network. It had become too costly and complex to manage, and it lacked the performance and flexibility to support the firm's hybrid cloud strategy. Persells saw the EdgeConnect SD-WAN edge platform as the answer.

"We were getting a lot of user complaints about poor application performance," Persells recalls. "We deployed EdgeConnect in most of our offices, and it's given us a solid backbone to run our applications."

Kenny Li, chief technology officer at Citrin Cooperman, adds, "We now leverage the flexibility and economics of broadband to connect our employees to business-enabling applications with the performance, predictability, and reliability required to delight our clients."

## Delivers higher quality of experience for end users

Citrin Cooperman deployed the EdgeConnect platform in 10 of its 12 global office locations, with the final two sites slated to come online soon. MPLS has been replaced with dual-sourced Dedicated Internet Access (DIA) links terminated on the EdgeConnect platform and bonded to maximize network resilience and bandwidth utilization. In addition, application performance has improved substantially thanks to gigabit DIA links (a dramatic increase from 15 – 50 Mbps MPLS), and advanced SD-WAN capabilities on the EdgeConnect platform, such as [path conditioning](#), quality of service (QoS), and [dynamic path control](#).



Citrin Cooperman continues to accelerate data replication and file transfers across long distances, now using the optional [Unity Boost™](#) WAN optimization performance pack unified with EdgeConnect. For example, with Boost, latency between the firm's New York and India offices is 20 – 30 percent lower. "Boost made a big difference in the quality of video

conferencing with India,” Persells says. “We’re also in the process of centralizing all our remote backups, starting with the LA office. That wouldn’t be possible without Boost.”

Regarding overall application performance, Persells notes, “We don’t get complaints about performance anymore. Our accountants and advisors are much happier with the quality of experience since moving to the Silver Peak SD-WAN. And we’re able to respond faster and more efficiently to clients because everything works better.”

Citrin Cooperman relies on three primary applications: CCH ProSystem fx Tax for the accounting and tax side of the house; CaseWare to support the advisory practice; and Polycom for voice and video communications. To ensure each application is guaranteed the network resources and priority it needs, Persells used the [Unity Orchestrator™](#) SD-WAN management interface to create QoS-driven business intent overlays.

Li points out, “Before, we had voice and video on a lower resolution setting because we didn’t have the infrastructure to support it. Once we deployed the EdgeConnect platform with business intent overlays and QoS policies, voice and video not only worked better, but we could turn up the resolution, which made a huge difference in quality of experience for our users.”

## Higher WAN uptime, lower costs

With the sub-millisecond link failover provided by EdgeConnect, WAN uptime has also improved dramatically. Persells says, “The failover from MPLS to

our backup internet was cumbersome and required working through our MPLS provider, which could take hours. Now, with EdgeConnect, everything is automated. Before, we got hundreds of emails from users complaining. Now, nobody even notices.”

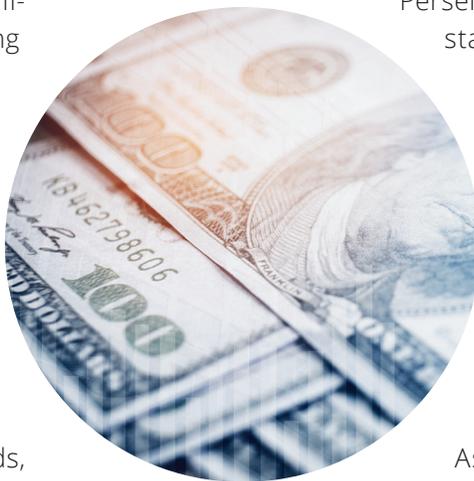
In addition, Citrin Cooperman has been able to consolidate its edge infrastructure, retiring traditional routers and instead using the built-in routing interoperability on the EdgeConnect platform.

Persells is now looking to also retire stand-alone firewalls at the edge in favor of the stateful zone-based firewall in EdgeConnect. This means substantial cost savings for the firm, and simplifies edge management for IT. It also enables local internet breakout from branch locations, connecting users securely and directly to the internet and SaaS applications like Office 365.

As Persells and his team advance their hybrid cloud strategy, the first workload headed to the cloud will likely be data replication for disaster recovery, and the EdgeConnect platform with Boost will provide a seamless path. “We’ll deploy a virtual EdgeConnect appliance in Azure, which will allow us to do our usual replication, but to the cloud instead of a physical site.”

Li concludes, “Everything we’re doing in IT and with the SD-WAN is to bring greater efficiency and service quality to Citrin Cooperman so we can focus on what counts. Ultimately, this will enable the firm to deliver better client services, greater client profitability, and increased shareholder value.

For more information on Silver Peak and our solutions, please visit: [silver-peak.com](http://silver-peak.com)



## Customer

**Citrin Cooperman** is among the largest full-service assurance, tax, and business advisory firms in the United States, having steadily built its business serving a diverse and loyal clientele since 1979. With more than 1,000 employees, Citrin Cooperman has 12 locations in the U.S. stretching from Boston Metro to D.C. Metro and Los Angeles, as well as locations in London, England; Ahmedabad, India; and Grand Cayman, Cayman Islands. Citrin Cooperman is an independent firm associated with Moore International Limited.

## Challenge

Citrin Cooperman's aging router-centric MPLS network had become too costly and complex to manage, and it lacked the performance and flexibility to support the firm's hybrid cloud strategy. Staff complained frequently about poor application performance and downtime due to network outages, which impacted client service.

## Solution

Citrin Cooperman deployed the Unity EdgeConnect SD-WAN edge platform in 10 of its 12 office locations throughout the United States, with the final two sites slated to come online soon. The firm also uses the

optional Unity Boost WAN optimization performance pack to accelerate data replication and file transfers across long distances. Unity Orchestrator provides centralized management of the entire SD-WAN.

## Results

- > Enhanced client satisfaction with assured application performance, predictability, and reliability
- > Projected substantial cost savings through consolidation of edge infrastructure
- > Reduced latency 20 – 30 percent for large file transfers between New York and India
- > Improved quality of experience for voice over IP and video conferencing
- > Increase WAN uptime with automated sub-millisecond link failover
- > Retired traditional routers and firewalls, enabling local SaaS breakout
- > Increased available bandwidth from 15 – 50 Mbps to 1 Gbps
- > Provided seamless path for extending SD-WAN to a hybrid cloud infrastructure



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