

# WIPFLi<sup>LLP</sup>

## CPAs and Consultants

## Case Study: Wipfli LLP

Wipfli eliminates print servers with PrinterLogic.

### Challenges

- Print management was time-consuming from the administrative side, and both new and existing end users found print settings, printer installations, and printing to be problematic.
- Print server management time and effort related to setup, configuration, deployment, maintenance, and troubleshooting were significant yet provided less than optimal convenience around print management.
- Even with regular reports from a service vendor, there was insufficient visibility into the print environment.
- Wipfli's IT Consulting clients are having similar challenges as Wipfli's Internal IT team around print services, especially with smaller organizations that are removing all hardware and going to the cloud.

Wipfli serves more than 60,000 clients with trusted financial and advisory services, helping them to streamline their operations, increase their efficiency, and leverage their strengths in an increasingly competitive global marketplace. The firm currently ranks among the top 25 accounting and consulting firms in the country according to Accounting Today's 2016 Top 100 Firms list.

Wipfli has grown to employ more than 1800 associates throughout 41 U.S. offices and two offices in India. The accounting and consulting firm provides industry-focused accounting, tax and consulting services to private and publicly held companies ranging in size.

The firm's clients include manufacturing companies, financial institutions, health care organizations, construction companies, real estate companies, nonprofit organizations, private equity firms, government entities, agricultural businesses, dealerships and individuals.

The scale of Wipfli's operations is evident in the firm's printing needs. It operates approximately 350 network printers and 50 USB printers throughout its various locations and printed 16 million pages last year with that number expected to grow significantly in the coming year due to recent growth and merger and acquisition activities.

Until 2016, Wipfli had operated its print environment through print servers much like other distributed organizations. Each office had its

### Results

- PrinterLogic's dynamic deployments and self-service portal have radically simplified the onboarding and printer installation process. "The PrinterLogic printing environment deployed near seamlessly!"
- The organization is on track to eliminate print servers across all of its 40+ domestic and international locations, thereby saving associated time and expenses.
- PrinterLogic's integrated reporting has made it possible for Wipfli to identify specific high-volume users and departments.
- Wipfli's IT Consulting Practice has begun working with PrinterLogic to utilize their PrinterLogic SaaS (formerly PrinterCloud) solution for an improved print management experience.

own print server, for a total of approximately 40 IT managed servers, each being a single point of failure for that office's overall print jobs. This created a significant risk of lost production if a print server were to fail. Those servers also required monthly maintenance and reboots, periodic troubleshooting, and helpdesk calls as users needed to install a printer or had trouble with their settings.

"At some point, we started transitioning all of our 2003 print servers to 2012," explained Michael Voegtline, an engineer analyst senior at Wipfli LLP. "Just going through that process helped me to realize the amount of management time that goes into taking care of printers per office and getting them ready to be able to print. That was the impetus to look at other solutions."

Wipfli also makes use of specialized tax software. That digital tax solution locked users to a server-side setting, which meant that for each print server Voegtline had to create a specialized duplicate print queue that users could access from their tax software. Even with this workaround, printing results were not always consistent across the entire organization.

When Wipfli IT Director Tom Lenz asked Voegtline to look into [PrinterLogic](#) as a possible alternative, he spent a few days researching the next-generation print management solution and took advantage of the free trial period.

"That demo changed my thinking about how we were delivering print services," Voegtline said. "I felt that this could really help us. It was a good product. Lenz attended a demo, asked a few pointed questions, and from there we were both on the same page."

Voegtline and his team soon rolled out PrinterLogic to two Wipfli offices to pilot the project. Based on its success, they are planning to make PrinterLogic part of the onboarding process for new users and are in the process of expanding PrinterLogic firm-wide to include all existing users and printers. In addition, Wipfli's Technology Management consulting team has begun finding use cases where the PrinterLogic SaaS Solution can help their clients solve their printing needs as well.

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### **Challenge #1—Improving the Manageability of the Print Environment**

Wipfli faced multiple challenges with its traditional print management practices. The first was that users had no easy way to identify and install printers themselves, which usually necessitated a call to the help desk, leading to specialized documentation and communications and additional challenges during the onboarding process for new users.

The second had to do with the way its tax software handled printer settings. "That problem gradually became a bigger and bigger issue as tax season started getting under way and people got really frustrated," said Voegtline. "Normally we print to a certain mailbox destination, and we print with standard settings. But for whatever reason, this tax application wasn't adhering to those settings. We worked with the tax software vendor to resolve the issue, but were unsuccessful and ultimately had to do an evaluation for every single office where Wipfli's tax software printed and determine how the users wanted their settings. Once that was decided, we had to set up a new print queue on every single print server to adhere to those settings, but even that didn't solve the problem because people wanted to print from the tax software to different printers that were not set up with the separate print queue."

Ultimately, the default printing behavior lacked consistency, and exasperated end users had to call the help desk to troubleshoot the issue.

### **Solution**

During the PrinterLogic pilot, Voegtline gave users who encountered printing problems a choice: Did they want to stick to the old way (i.e., a separate print queue) or did they want to migrate to PrinterLogic?

"Each and every time we set them up with PrinterLogic, it solved the problem, and no one had any further issues when printing to the tax software. Every time we deployed it, every time we had people using it, it just worked. We had very few problems in both locations, and printing worked how we wanted it to when printing from the tax software using the PrinterLogic solution. That was probably the biggest thing that convinced us to take it from the pilot to firm-wide," he said.

"Most products work after a lot of tweaking and a bunch of learning and changes to making them work. PrinterLogic just worked out of the box. We didn't have the one-off printer problems that we used to have."

Because of PrinterLogic's self-service portal, the onboarding and routine installation process has changed too. New users can have printers automatically installed based on their IP address, thanks to PrinterLogic's dynamic installation features. Existing users can now

simply visit an internal Web page that allows them to easily identify and install nearby printers from a map of that office with a single click.

### **Challenge #2—Reducing and Ultimately Eliminating Print Servers**

On account of Wipfli's continuing growth, the expansion and acquisition process is a fairly common occurrence. This means that Voegtline is regularly onboarding not just individual employees but whole new locations. Under the distributed print server paradigm, he

was forced to follow an arduous, time-consuming process every time an office was added.

"We request a server. Someone has to build it, someone has to patch it, and someone has to update it, all of which we track in our ticketing system. Then we need to install our management

agents and set up a backup if we need it, and from there it finally gets turned over to me, and I install the print services. Finally, I set up all the print devices, ports, download all the drivers, and set up the print queues," he said.

"There is so much time and cost associated with managing 40 or more print servers including, purchasing all the agent and OS licenses, patching print servers, rebooting them, taking care of all of them during monthly maintenance, keeping them all up to date, making sure they're not vulnerable, and so on. That was a big reason we wanted to eliminate our print servers."

### **Solution**

From the very start, PrinterLogic's next-generation approach radically changed how much time Voegtline was required to invest in print management. It took him a single workday to fully integrate PrinterLogic into the existing print environment.

"Now, every time we want to add another office when a merger or acquisition takes place, it's a matter of 15 minutes to pull those printers in. You point it to the print server that's there, you tell it what printers you want moved over, select the folder you want them installed in in PrinterLogic, click import and in a few minutes, it's done. And if I want to get fancy, if you have an office layout diagram, I can just drop the map into the self-service portal and drag the printers where they are located on the map and it's ready to go."

It also changed his expectations about print management in the future once all print servers are eliminated. "Once they're all gone, we'll no longer have to patch these 40 servers. We won't have to reboot them. We won't have to monitor the print services to make sure they're up and available. We won't have to back them up. We won't have to do anything with them because they won't exist. The entire management of print servers will go away at that point, along with all the time and hassle, which is significant. We can just pull all of our printers into PrinterLogic, and off we go. In the end, PrinterLogic eliminated the risk of print servers being a single point of failure and also helped reduce overall management costs for Wipfli."

### **Challenge #3—Gaining Visibility into the Print Environment**

Although Wipfli contracts with a 3rd party vendor to service its printers, Voegtline said that the firm wanted "the ability to get more information on our printing and our print costs" that couldn't easily be provided by a third-party vendor or the native print server features.

"The 3rd party vendor provides us reports, either ad hoc or quarterly, and we review those, but another thing we liked about PrinterLogic was the ability to get the real-time information we need to make decisions about printing and costs," he said.

### **Solution**

PrinterLogic's built-in reporting tools surpass any similar print server functionality and can provide detailed printing information broken down by users, departments, and devices, including USB-connected printers, which the firm had no information on before PrinterLogic.

When the 3rd party vendor supplied its own reports for the firm's general maintenance agreements, Voegtline could associate that cost per page directly in PrinterLogic's reporting interface, which allowed him to determine cost/benefit ratios for the firm's service contract as well as the individual devices that make up the print infrastructure.

"From there, I can see that somebody is using a single-function printer for all their tax returns—the difference in cost on that single-function printer is at least double that of a multi-function printer. So I can say to them, 'Why have you printed so much on this single-function printer when there's a lower cost per page multifunction device right around the corner?' Most of the time they don't even know that it makes a difference and opening that dialog with them can help the firm to reduce print costs with the real-time cost reporting built into PrinterLogic."

### **Challenge #4—Meeting the Needs of Our Technology Management Clients**

Wipfli's Technology Management clients have been struggling with managing their print environments and asked our consultants for solutions that could improve their printing. They are having many of the same struggles that Wipfli's IT team was having and wanted an easier way to handle printing in their organizations.

### **Solution**

The PrinterLogic SaaS solution provides similar functions to the PrinterLogic solution that Wipfli installed internally and they have begun working together to provide a similar print management experience for the firm's clients so they can experience many of the same benefits Wipfli has experienced with the internal implementation of PrinterLogic. Providing an option where a server is not required allows Wipfli to further assist clients with their move to the Azure Cloud. Wipfli Service and Delivery Manager Jason Vander Velde said, "Clients who want to go to the cloud are in need of a solution that can accommodate that move. PrinterCloud\* appears to be the solution."

### **Conclusion and Savings Summary**

Wipfli has completed its pilot phase and, on the basis of the time, effort, and costs already saved from this limited implementation, is ready to roll out PrinterLogic across all of the firm's 43 offices in the United States and India.

"I received positive feedback from the tax manager and two office managers. My recommendation was to deploy the solution firm wide and eliminate all print servers, and we are currently in the process of making that happen. Going forward, we will not have any print servers. As the firm expands and adds more printers, they'll just get added into PrinterLogic," said Voegtline. The firm is also planning to pilot PrinterLogic's optional pull printing functionality for additional convenience and security in the future.

In fact, Wipfli is so convinced of PrinterLogic's benefits that the firm plans to make it a recommended solution for its IT technology management consulting practice's clients as well.

"We have an IT consulting practice and, as we go forward, the next steps are to show that this really is working for us, and it could certainly work for our clients as well. We're not doing print management the way we used to do it."

\*PrinterCloud is now PrinterLogic SaaS