



## Solutions & Success The Inside Story

**Company & Location**

Advocate Capital, Inc.

**Industry**

Financial Services

**Services Offered**

Provision of financial services and support for clients in the legal industry.

**Case Study Respondent**

Mary Berst, Vice President,  
Operations and Accounting

# Responsive IT Support



## Challenge

Responsive and effective IT services are a priority for Advocate Capital, Inc. The AdvoTrac case funding system that Advocate Capital, Inc. uses requires nearly 100% uptime – a tall order for any IT company that they work with. Unfortunately, from the early 2000s until 2017, the company they worked with struggled to keep up with Advocate Capital Inc.'s growth, which led to long delays in support response times.

Advocate Capital, Inc.'s first attempt to solve the problem was to task one of their employees with handling their IT in concert with their IT company. Unfortunately, they soon became overworked as well.



“Claire, who is our Operations Administrator, she basically started learning a lot about what our former vendor did, and to save money for ourselves, she started taking care of what was most expensive,” says Mary Berst, Vice President, Operations and Accounting, for Advocate Capital, Inc. “She was basically our internal help desk. By the time I joined in 2015, Claire didn’t have the bandwidth to help support.”

## Solution

Berst and Advocate Capital, Inc. began looking for a new IT company that could deliver faster response times and a more effective IT strategy. Their next IT company would be tasked with implementing the necessary controls to achieve sufficient uptime and respond quickly when there were issues affecting the application.

After a review of multiple IT companies, Advocate Capital, Inc. determined that Kraft Technology Group was the right choice for them.

## Result

“Kraft Technology Group was above and beyond what our current vendor was providing or could provide,” says Berst. “We were sitting on pretty aged equipment and software, and in the very short time that we’ve been with them, they’ve really moved us in a very positive direction towards keeping the lights on.”

# Security Services & User Awareness Training



## Challenge

On more than one occasion, employees at Advocate Capital, Inc. were falling for conventional phishing scams that made it into their inboxes. The key to phishing's effectivity is how unsuspecting the target is. The fact is that businesses aren't learning to protect themselves, which is why the number of reported phishing attacks has gone up by 65% in the past few years. This type of cybercrime can be very dangerous, with the average phishing attack costing businesses \$1.6 million.

"We weren't prepared to educate our employees on phishing, and it was going to be very expensive to investigate or get some sort of software to teach them what not to do," says Berst.

## Solution

One of the services Berst sought out from their new IT company was security training for their employees. Kraft Technology Group's robust security services include security training and simulated phishing attacks to test their staff's capabilities, which is one of the reasons Advocate Capital, Inc. opted to work with them.

"Kraft Technology Group just hit the sweet spot – they could hit all levels of security perimeters for us, and they brought IT security training," says Berst.



## Result

"The security has been really fabulous. 2-4 times a day, emails are going to KTG about suspicious emails," says Berst. "They would have us take a test every week, and we make sure everyone stayed in the green zone."

The best cybersecurity technology and practices in the world can be undone by one staff member who doesn't understand how to use them, or how to protect the data they work with. A comprehensive cybersecurity training program delivered by Kraft Technology Group teaches users how to identify and respond to potential phishing scams.

# IT Strategy & Vendor Management



## Challenge

Advocate Capital, Inc. lacked a strategic approach to the management of their IT. Whether it was how their technology supported their business processes, or how they interacted with the other vendors that delivered their IT solutions, their previous IT company couldn't deliver the strategy needed to keep everything organized and optimized.

## Solution

Kraft Technology Group became an extension of Advocate Capital, Inc., integrating with their staff and liaising with their vendors to make sure that everything IT-related was properly managed to support other parts of the organization.

Kraft Technology Group developed a 12-month IT roadmap for Advocate Capital, carried out via quarterly meetings with their leadership team which made sure their business goals were being supported by the right technology and security.

## Result

This comprehensive level of support and expertly aligned IT strategy has both eliminated complications and lead to an overall improvement in IT-based processes.

"They were even helpful with getting the developer to understand the nuances between their software and our systems," says Berst. "They were very patient with the developer."



***"They're dedicated and they're loyal," says Berst.  
"They treat us as if we're all part of the same team.  
They became a very valuable asset for us."***



-Mary Berst, Vice President,  
Operations and Accounting, Advocate Capital Inc.