



CASE STUDY

STETZ, BELGIOVINE, MANWARREN, AND WALLIS, P.C. DISCOVERING A BETTER EMAIL SECURITY SOLUTION



“A PROLIFIC ACCOUNTING FIRM”

Stetz, Belgiovine, Manwarren, and Wallis, P.C. has operated since 1993 as a prolific accounting firm servicing small to medium size businesses and individuals. The firm’s Senior Partner and its Principals were formerly with a medium size accounting firm from Central New Jersey. Over the course of a decade, the firm’s Principals have devoted time and effort to create a philosophy of customized professional services specific to customer needs. The firm does this by thoroughly understanding each customer’s business to devise the most cost effective solutions. These services are accomplished through a combined effort of intellectual ability, state of the art technology and the benefits of practical experience. The firm prides itself in being able to deliver sophisticated technical services to those who ordinarily would not have access.

THE CHALLENGE

For Alex Belgiovine, a partner of the high-profile accounting firm Stetz, Belgiovine, Manwarren, and Wallis, P.C., the challenge to find a replacement for the firm’s email security service came as a sudden surprise. Late October 2015, Intel announced the End-of-Life (EOL) of its McAfee Email Security Solutions, and Belgiovine had to face the unforeseen responsibility of finding a suitable replacement for the firm’s secure file transfer system. For an accounting firm representing thousands of clients (both corporations and individuals), ensuring the confidentiality of sensitive financial data remained a top priority.

As an early adopter of email encryption technology, the firm has strived to stay ahead of the curve in terms of the quality and security of its services. “We are primarily a tax practice and we prepare tax returns for our clients. It doesn’t get more confidential than that. People value their social security numbers and earnings records and need a secure way to send and receive that information,” Belgiovine stated. The abrupt EOL of McAfee’s solution presented an immediate challenge to ensure consistency in the quality of the firm’s future ability to provide those services, but for Belgiovine, the EOL also offered an opportunity to evaluate and compare advanced alternatives.

“We’re constantly dealing with large files going back and forth, but we were having problems with people wanting to send encrypted files back to us. A lot of other products offer a simple way to encrypt an email and send it out, but very few offer a way for the client to send it back to you. Finding a secure solution that allowed us to bring more value to our clients by allowing them to back-up, encrypt and send us their files without having to subscribe or pay for another service was ultimately what drove our decision-making process,” Belgiovine said.

The widespread client use of diverse cloud storage services to transfer large files also presented a challenge in the daily operations of the firms. The process of keeping track of individual passwords for each client storage account interfered with the efficiency of services provided.

Of the three email security offerings Belgiovine considered, only one offered a way to send encrypted files back and forth with no restrictions on file size. The other two provided basic secure email services, but they could not meet the firm’s expanding workflow requirements in a way that would better serve the needs of clientele. Only one provided Belgiovine with the answer for the firm’s business needs.

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THE SOLUTION

[Litéra Secure File Transfer](#)® offered Belgiovine an alternative email security solution to send encrypted files back and forth between clients. As an on premise encrypted file transfer service, it improved the firm's previous service with MFA (multi-factor authentication) and two-factor authentication, no limits on file size, a customizable retention/expiration period, and the ability to request files from clients.

"We use Litéra Secure File Transfer® to transmit client tax returns electronically and to transmit sensitive financial data back and forth between clients, but we're also using it more for large file transfers than I thought. I initially thought people would be more reluctant to stop using their familiar cloud storage services, but they are using Litéra Secure File Transfer® more readily for sending large files securely. It's even better for us because it takes care of the need to manage so many passwords. The best thing, however, is the ability to have our clients email or transmit us sensitive financial data easily and securely without having to register or subscribe to anything themselves," Belgiovine commented.

For Belgiovine, apart from allowing back-and-forth encryption, the service also stood apart from alternative solutions with its ability to clean metadata and the option to apply the firm's custom branding to the web portal, Outlook add-in, and Mobile app.

"What we couldn't do [with McAfee], and what you can't do [with other solutions] is customize the branding. It looks like us when people see it," said Belgiovine.

THE RESULT

Although the EOL announcement of McAfee Email Security Solutions forced Belgiovine to seek after an alternative solution, it provided the opportunity to discover a secure file transfer system better suited to meet the needs of his firm. The firm's implementation of Litéra Secure File Transfer® in late November 2016 was "straight-forward" and "seamless." Transitioning both staff and clients to use the new service was "simple" and "easy."

Both the staff and the customers like having the option to use either the web portal, Outlook add-in, or the Mobile app. Per Belgiovine, each portal provides an equally reliable and simple UI, but it gives people the flexibility and the option for secure mobility. Between the users, the clients, the partners, and the staff, some exclusively use either the add-in or the web portal according to each individual's personal preference.

"Compared to what we were using before, Litéra Secure File Transfer® has been very well received by both our staff and our clients. Ease-of-use and simplicity is big. It makes our clients happy and everyone's lives easier; it's impossible to put a number on that kind of value. Ultimately, our clients trust us; we have a very high retention rate. Using this service gives our clients even more confidence in the quality of the services we provide," Belgiovine stated.

At the time of the interview, Belgiovine's firm was moving into its busiest time of the year with the onset of the 2017 tax season. So far, loading and upload times are faster than the previous solution with file sizes ranging from 2MB to 186MB.

"We are a service organization," Belgiovine concluded, "Anything we can do to bring value to our clients we do. Historically, the biggest difference [using Litéra Secure File Transfer®] is the two-way street. As I said before, the ability for our clients to send us back encrypted files without them having to subscribe or pay to use another service is what led us to choose Litéra over everyone else." 

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