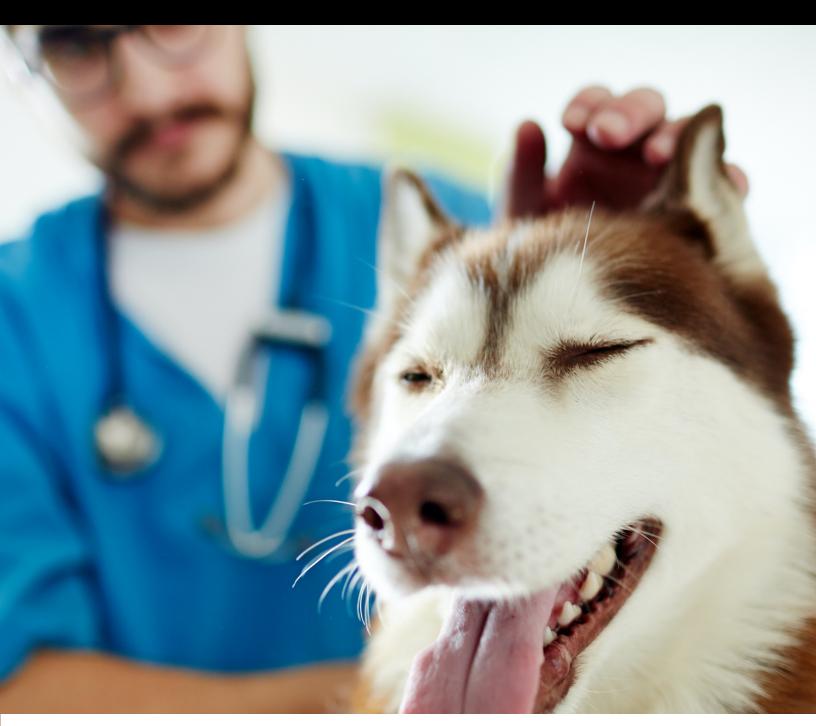# ROOK

ALWAYS ONE MOVE AHEAD

Creating Solutions That Work

Increasing simplicity and efficiency for veterinary medicine.

THE SITUATION

> *Instead of focusing on their customers, the vet clinic leadership were having to address their technology problems.*

A veterinary emergency hospital was facing a slew of challenges with their existing technology service provider. System performance problems plagued the organization, both on their cloud-hosted platforms and their internal office workstations.

Their practice management software, which houses all customer, patient, and billing data, required upgrades. Unfortunately, the cloud hosting service was not capable of completing the upgrade in less than 12 hours. This left software systems out-of-date and security vulnerabilities unaddressed.

When the service provider performed smaller updates, the systems remained offline for longer than anticipated, leading to productivity reduction for the staff and increased customer frustration levels.

Costs were unpredictable, and in an attempt to maintain cost consistency, the IT service provider reduced their level of responsiveness. This led to unplanned system outages, unprepared technology staff, and miscommunications.

THE SOLUTION

> *The transition's success criteria were set; a complete data and service migration with no data loss, very minimal downtime, and a seamless support changeover.*

Rook Advisors worked with the vet clinic to establish a plan for changing the IT support provider and moving all cloud operations into a new hosting facility. In addition to learning about and supporting a new business, Rook Advisors team members would also have to become experts on the organization's cloud infrastructure details before moving any systems to a new facility.

The transition's success criteria were set; a complete data and service migration with no data loss, very minimal downtime, and a seamless support changeover. This transition required setting up a test environment to mirror the current production

systems and performing practice data migrations. A small overnight maintenance window was available for the bulk of the data transition to occur. Knowing how long the data move would take and solving potential problems ahead of the live data move were critical components.

Once Rook Advisors completed testing, coordination with the previous MSP (managed service provider) resulted in an overnight transfer of the MSP-hosted data to the new hosting facility. Our team brought the critical systems online first, as non-critical data was still in the process of copying over. This method resulted in a much smaller downtime window as the practice management systems were available much sooner than previously expected.

POTENTIAL PITFALLS

There are many potential pitfalls that can cause problems during any data or service migration. Preparation and research are required to mitigate these pitfalls. Close coordination with business leaders is also essential to avoid potential problems before they occur.

The following are things we specifically look for and solve:

Limited understanding of technology systems

A thorough onboarding process, including inventory, documentation review, and staff introductions, are used to ensure a complete understanding. Documentation is created and disseminated to all support staff.

Lack of access to required systems

Having the outgoing MSP or IT staff fill out a detailed transitioning form helps complete the technology picture. Rather than relying on the outgoing team to be forthcoming with information, a questionnaire built on years of experience is used to identify key areas where information is required or may be missing.

Limited business understanding

By making introductions, documenting company structure, and labeling computers and equipment, Rook Advisors quickly builds knowledge around the business and business processes.

Poorly communicated support procedures

Simple and effective tools like printed mousepads, stickers for monitors, and computer tools with quick access to support information help staff members

know whom to contact when there is a problem. By introducing staff to their new support team, the employees feel more comfortable reaching out for help when needed.

CHALLENGES FACED

Even though plans were put into place to mitigate problems before they happen, unforeseen issues still arise from time to time.

The outgoing MSP had limited support hours that restricted parts of the data migration to business-hours only timeframes. Working with the vet clinic to determine which days of the week were statistically less impacted by specific systems allowed Rook Advisors to reduce the interruption caused by the data migration.

We discovered that critical system databases needed re-indexing during the final data migration, and that process could take up to 15 hours. The infrastructure team immediately brought specialized high-performance servers online to process the data more quickly. In the end, we reduced the migration and re-indexing process from 15 to only 4 hours.

After we completed the migration of each major application, the office workstations required updating. During this process, we discovered that some of the documentation from the previous MSP was incorrect. The MSP refused to deliver the required information, citing security concerns as they used the same passwords for their other customers. Unfortunately, this is a common problem, so Rook Advisors devised an alternative plan, and workstations were forcibly reset with new accounts and passwords. We spent extra time on the process, but we successfully updated all the workstations.

THE SUCCESS

> *Building rapport and trust are critical elements in a long-term business relationship.*

The first night of the changeover included data and server facility migration and the transition to the new support team. Rook Advisors staff were on site when the office opened in the morning to answer questions and handle minor issues.

Because of the depth of involvement in the migration process, Rook Advisors were intimately familiar with all aspects of the clinic's software usage and configuration. This expertise resulted in clinic staff getting answers to their questions and support resolution quicker than they were accustomed to.

Being onsite for the first day provided a good opportunity for Rook Advisors to get to know the vet clinic staff. Building rapport and trust are critical elements in a long-term business relationship. Taking the time to understand the technical systems and understand and empathize with staff members is how Rook Advisors begin the relationship-building process.

In the end, Rook Advisors met all of the migration goals:

- There was no data loss
- The downtime was less than expected
- The impact of downtime was mitigated
- Support hand-off was smooth

Not only were the technical problems solved, but we addressed the support and budget problems as well. Working with the clinic, Rook Advisors agreed on a rate that provided cost stability and enhanced support reliability. Clinic leadership was able to stop worrying about their IT troubles and get back to focusing on what mattered to them: their patients and their customers.