

# CPA firm Kreston Reeves supports remote work

## Citrix infrastructure enables this shift

The Prime Minister's pandemic-related "Work from Home" mandate gave rise to innovation and new ideas for the future of this service business

One day it was business as usual. The next, accountants and CPAs were rearranging spare bedrooms or sweeping off dining tables to accommodate a mandated Work from Home initiative. Many organizations in the accounting and CPA services realm were caught off-guard by the far-reaching effects that the COVID-19 outbreak would have.

However, Kreston Reeves, a London-based CPA firm, had long-since been ready for this kind of challenge. Years ago, the company had deployed and begun using its Citrix infrastructure. Day-to-day virtual computing ran on the Citrix platform and the business continuity plan was based on the same technology.

Most companies assume that they won't ever use their business continuity solutions

One thing surprised the team about how things unfolded: the occasion to use the business continuity solution actually materialized. "When IT teams implement disaster recovery plans, we consider it a long shot that we will ever have to use them," says Chris Madden, IT & Operations Director. "Our solution was quickly put to the test, and we're grateful that it worked really well!"

As the entire company's workforce moved home, IT leaders had another revelation: the team was able to capitalize on the remote work situation to gain much-needed insight about employee productivity and ingenuity. Work from Home became warp-speed learning. The lessons learned may be put to use in breaking with traditional strategies and charting a new way forward for the company.

Kreston Reeves had Citrix technology in place for the better part of a decade prior to the COVID-19 outbreak. "We'd never had to test our disaster recovery plan to its limits during that time. In the week before the Prime Minister ordered employees to work from home, we deployed two scale-up exercises in two locations," declares Madden. "We increased the typical remote user load from a daily average of 50 users to 150. Once we deemed those two tests successful, we worked to accommodate the entire workforce, scaling up capacity to the 550-600 range. We accomplished that in only five days."



**Industry**  
Finance

**Location**  
UK

**Citrix products**

- Citrix Virtual Apps and Desktops
- Citrix ADC
- Citrix Application Delivery Management
- Citrix Cloud

**Key Benefits**

- Citrix Virtual Apps and Desktops delivers secure remote access to applications and desktops
- Citrix ADC provides load balancing for apps, remote access and a secure perimeter, analytical capabilities, and access to a university website
- Citrix Application Delivery Management helps the technical team manage, monitor and troubleshoot the application delivery infrastructure – all from one console
- Citrix Cloud service will be implemented at a later date

## Work from Home insights start the dialog about the future

Thanks to the Work from Home initiative, the Kreston Reeves team understands just how agile its workforce can be. Andrew Griggs, Senior Partner, notes, “The COVID-19 scare not only enabled us to see how easily we were able to transition to working remotely, but also, it revealed that our financial advisors and accountants became innovative very quickly.”

He continues, “Creative employees implemented new ways of solving traditional problems. Their ideas will help us fine-tune and accelerate some strategic initiatives as we go forward.”

The team also learned about the employee experiences remote workers had and the challenges technologists faced in managing the environment. Both the IT and knowledge worker teams envisioned ways in which they could evolve their work models. Accountants, CPAs and others imagined new ways to handle traditional interactions with customers.

One great example is service line work. Previously, audits were conducted on-site. Creative health-conscious remote workers surmised that more of the audit work could be conducted remotely than ever before. Rather than spending a great deal of time at clients’ locations during a dangerous pandemic, they offered portal technology to clients so they could upload information themselves beforehand. The Kreston Reeves team then spent time analyzing documents and interpreting information before anyone went on-site. This was a departure from tradition.

Griggs explains, “Executing the lion’s share of an audit remotely was actually a more efficient way of getting the job done. We found that we could get 90 to 95 percent of the audit completed before even visiting the client’s site.”

By spending less time at client locations, knowledge workers can be more focused because they already will have interpreted crucial information. “Team members don’t have to process things on-site, so they will have more time to act as trusted advisors providing well-thought-out management advice that will help clients run their business in a better way,” he notes.

## Remote workers have a consistent familiar experience on any device

Delivering a great employee experience is important to the leadership team at Kreston Reeves. The Citrix “use any device – at any time – over any network” capability was the enabler that solved a looming companywide problem: there simply weren’t enough devices to go around. What’s more, in the Kreston Reeves setup, thin clients didn’t work in the home environment. This didn’t matter because Citrix enabled three fifths of the workforce to use their own personal devices at home.

## Corporate data is protected with Citrix

“With the security capabilities that are built into Citrix, we’re able to protect our corporate data and apps from threats lurking on employee-owned devices,” Madden describes. “Because security is transparent to the user, remote workers have the same positive employee experience that they have when working in the office.”

**“Citrix was the enabler that solved a looming company-wide problem: there simply weren’t enough devices to go around... Citrix enabled three fifths of the workforce to use their own personal devices at home.”**

**Chris Madden**  
IT & Operations Director  
Kreston Reeves

“There is no difference when working at home,” Madden says. “Employees log in to the same desktop with exactly the same software and do exactly the same thing. Location has absolutely no impact on users’ ability to work productively.”

Both Griggs and Madden see many positives associated with remote work. A great employee experience and strong, yet transparent security are among them. They agree that individual stylistic and personality differences will impact what a particular employee prefers – office-based or remote work – but either will be possible in the “new normal phase”. Most likely, the company will settle on a mixed hybrid approach as the Back to Office phase opens up.

### Change is constant and work models are constantly being evaluated

Madden envisions that the team may also rethink its real estate strategy. If the company moves to a mixed remote and office strategy, is some of the current office space really needed? Will employees want to travel into the city to work in the same way they could work at home? Also, given the wide variety of ages and demographics of workers – employees range from 18 to 65 years of age – will having options for a mixed work style help keep employee satisfaction high among different generations of workers? These are the kinds of questions the team will consider.

According to Griggs, the only thing that’s constant is that the need to accommodate new work styles. For example, he has peers in larger CPA firms who are working from home several days per week. While that model works well, some of their staff members also are admitting that they would like to have more contact with colleagues when working from home offices. They want WeWork sites too. “We’re constantly evaluating new experiences and requests,” he states.

Madden adds another consideration, “Employees want to be trusted to work from home. This kind of new trust model is a change in psychology,” he explains. “Workers should not need to sit outside a manager’s office in order to be seen as productive. They should be evaluated on their work output.”

Griggs interjects, “This dynamic means that we may change how we look at billable hours. Remote workers will be micromanaged less and will be more self-accountable. Leaders will set direction and the workers will gain more autonomy.”

### The Kreston Reeves business continuity infrastructure supports work anywhere

The Kreston Reeves team build the business continuity strategy with the idea that many scenarios could exist. Everyone may be working from home. All employees may be working in an office. Maybe there is a hybrid model with some portion of workers at home and some in the office. As part of the strategy, they designed the business continuity system so that if the on-premises data center were to be destroyed, the IT team could spin up in a third party disaster recovery data center.

The team did this because working with clients is the lifeblood of the company. If accountants and financial advisors cannot execute client work, they cannot bill hours and the business cannot survive.

In the event of a disaster, the workers in the business will have no idea that compute resources have been moved. They will log in to the system as they normally do, and the disruption will be transparent to them.

Madden summarizes, “The Citrix infrastructure, based on Citrix Apps and Desktops, delivered exactly the type of stable platform we imagined. We easily scaled up to accommodate all 600 users and did not have to remediate a thing.” He continues, “With our system, every employee gets the same desktop and has the same experience regardless of job function. So whether the worker is an accountant or tax person or an administrator, the individual logs in to Citrix and sees the same desktop.”

Each user can see the applications that are on the desktop, but that doesn't mean that each individual can open every app and see everything in it. Users can see all of the apps that exist, but permission to use software – based on context – must be granted separately.

### Three people manage the technical side of things

Only three people in the Kreston Reeves IT team deal with the technical side of things, so this is one of the reasons why Madden and the team want to move to the management layer of the environment to Citrix Cloud Service. That transition will occur in the twelve months and it will significantly improve visibility into the entire environment.

Madden describes the team as a Microsoft shop. Most of the industry-specific software that they use requires a Microsoft operating system or Microsoft SQL to run. “Our Citrix environment is optimized for Microsoft 365 for Teams, Yammer, Intranet, OneDrive, and more,” Madden remarks.

### Three people manage the technical side of things

Only three people in the Kreston Reeves IT team deal with the technical side of things, so this is one of the reasons why Madden and the team want to move to the management layer of the environment to Citrix Cloud Service. That transition will occur in the twelve months and it will significantly improve visibility into the entire environment.

Madden describes the team as a Microsoft shop. Most of the industry-specific software that they use requires a Microsoft operating system or Microsoft SQL to run. “Our Citrix environment is optimized for Microsoft 365 for Teams, Yammer, Intranet, OneDrive, and more,” Madden remarks.

### Citrix ADC is a key part of the Kreston Reeves environment

Another component of the integrated Citrix product stack at Kreston Reeves is Citrix ADC. Not only is the solution used for load balancing applications, but also, for remote access. Madden adds more detail, noting the security benefits delivered by ADCs in the infrastructure: “Citrix ADCs do a brilliant job because they literally secure the perimeter for us. We have two-factor authentication enabled,” he says. “That gives us a nice resilient external touch point. We're always quite confident that ADCs are protecting our intellectual capital.”

Madden notes that the team did a penetration test designed to see if hackers could actually get through. He and the team felt that with everyone working from home, that test was crucial. The test confirmed that the system is secure and resilient.

Kreston Reeves also is implementing security policies – standards – through its VGX virtualized instances of Citrix ADC.

Citrix Application Delivery Management (ADM) is another piece of the puzzle. ADM helps the technical team manage, monitor and troubleshoot the application delivery infrastructure – all from one console.

### During the pandemic, Kreston Reeves seamlessly continued business operations while many faltered

Over the years, many smaller traditional accounting practices have opted not to take a strategic view. Only sporadically have they invested in technology, believing that large investments would adversely affect their profitability.

“The trouble with technology – especially when it comes to business continuity systems – is that you only know you need them when you need them. The problem is that you must invest in business continuity consistently over time in order to build a solid platform that is available and flexible in the event of serious business disruption,” Madden explains. “We do this so that when something does come along like a COVID-19 lockdown, we can quickly swing resources into action.”

This year, for Kreston Reeves, that thinking has paid off handsomely.

#### Enterprise Sales

North America | 800-424-8749

Worldwide | +1 408-790-8000

#### Locations

Corporate Headquarters | 851 Cypress Creek Road, Fort Lauderdale, FL 33309, United States

Silicon Valley | 4988 Great America Parkway, Santa Clara, CA 95054, United States

©2020 Citrix Systems, Inc. All rights reserved. Citrix, the Citrix logo, and other marks appearing herein are property of Citrix Systems, Inc. and/or one or more of its subsidiaries, and may be registered with the U.S. Patent and Trademark Office and in other countries. All other marks are the property of their respective owner(s).

