

CASE STUDY: PALLAS CAPITAL ADVISORS, LLC

The Path Towards Optimization After Successful Onboarding

SOC 2
TYPE II
CERTIFIED

Disclaimer: No compensation was provided to Pallas Capital Advisors, LLC for this case study testimonial.

Introduction

Pallas Capital Advisors, LLC (Pallas) is a leading financial advisory firm dedicated to helping clients preserve and grow their wealth. With a focus on independence, flexibility, and control, Pallas offers a robust infrastructure, cutting-edge technology, and deep expertise in estate and tax strategies. Their commitment to providing exceptional service and innovative solutions has made them a trusted partner for advisors and clients alike.

Challenge

As a newly onboarded client, Pallas was looking for Sourcepass to optimize their IT infrastructure to maintain a competitive edge. After Sourcepass completed a full assessment of the environment, some of the recommended goals for Pallas include:

- Optimized network infrastructure to avoid potential disruptions to business operations
- Optimized Microsoft Office 365 environment to provide seamless collaboration across teams
- Scaling of their IT infrastructure while maintaining high security standards

Our Approach

Sourcepass has extensive expertise onboarding new clients. Following the onboarding process, Sourcepass performs a comprehensive assessment of the IT infrastructure to identify areas for improvement and optimize efficiency and security. For Pallas, Sourcepass found the perfect solution to fulfill these needs.

Solution

The tailored solution that Sourcepass recommended includes:



Network Refresh Project: Sourcepass initiated a network refresh project for Pallas's main location, upgrading their network infrastructure to improve reliability and performance.



Office 365 Environment Optimization: Sourcepass proposed working on optimizing Pallas's Office 365 environment, enhancing productivity tools, and ensuring seamless integration across their systems.



Scalability & Security Enhancements: The solution included scalable IT infrastructure and robust security measures to support Pallas's growth and protect their sensitive data.

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Sourcepass made our onboarding process smooth and efficient. Their team quickly assessed our IT infrastructure and implemented the necessary upgrades, improving our network reliability and performance. We are happy with the positive impact on our operations and look forward to continued success.

– Jack McCroken, Chief Technology Officer

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Conclusion

The collaboration between Pallas and Sourcepass has been a success. By addressing critical IT challenges and implementing a tailored solution, Sourcepass has helped Pallas enhance their network infrastructure, begin planning the optimization of their Office 365 environment, and provide scalability and security. This partnership has enabled Pallas to continue providing exceptional service to their clients while maintaining a competitive edge in the financial advisory industry.



Sourcepass provides the technical expertise, strategic guidance, and impactful technology solutions to transform your company into a modern, secure, cloud-enabled business. Start your journey today by contacting us at 646.681.5528 or visit www.sourcepass.com.