Preventing a Single Point of Failure for a Growing CRE Investment Firm

Managed IT | Co-Managed IT | Cybersecurity

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Background

A growing CRE investment management firm with just under 100 corporate users and multiple managed properties found themselves in a precarious position when their sole IT director—a 20-year veteran of the company - submitted their resignation.

Challenge

This individual was the custodian of two decades of largely undocumented but business-critical knowledge. The firm needed to act fast to prevent what could have been a catastrophic loss of operational capability.

Like many growing businesses, their existing IT infrastructure had become increasingly complex—yet maintenance relied entirely on a single internal resource. This created several critical problems, including:

Knowledge Gaps: With the IT director's imminent departure, the company stood to lose 20+ years of undocumented system knowledge.

Access Issues: The outgoing IT director held the sole administrative credentials for numerous essential systems.

Fragmented Support: The company was using multiple MSPs—one for corporate users and another for property management—creating confusion about where to direct technical issues. Users faced frustration with multiple ticketing systems, support emails, and a lack of clarity about who to contact for which problems.

With only two weeks before the IT director's final day, immediate expert intervention was a must.

The firm's CFO, who had worked with us previously, reached out. Within 48 hours, our vCIO specialist was on a plane.

We fast-tracked a comprehensive strategy:

1. Emergency Documentation and Knowledge Transfer
Conducting an intensive four-day discovery process with the departing IT director allowed us to document all systems, configurations, and support arrangements. We also created new administrative accounts to ensure continued system access.

2. Holistic Assessment of IT Environment
Working with departmental leaders, we evaluated existing systems, workflows, and support structures, identifying critical vulnerabilities and inefficiencies. Next, we produced a detailed gap analysis and prioritized remediation recommendations.

3. Unified Support Structure Implementation
Additionally, we consolidated multiple support channels into a single point of contact, implementing a streamlined ticketing system and clear escalation paths to help users resolve IT issues faster.

Results

The partnership resulted in immediate and significant improvements

Business Continuity Assurance: The firm successfully navigated the IT director transition with zero operational disruption.

Enhanced End-User Experience: Users now have a single, clear point of contact for all IT issues.

Reduced Risk: Documentation and proper access controls eliminated single points of failure.

Strategic Alignment: Leadership gained visibility into their IT environment and how it supports growth goals.

Partnership Highlights

What made the greatest impact wasn't the technical solutions but our relationship-based approach. While the firm had previously worked with MSPs, leadership had never even met representatives from those companies. By contrast, Anderson Technologies was physically present, engaging directly with staff to understand their challenges.

We know the value of a genuine partnership approach rather than a faceless vendor relationship. As the firm's CFO noted, "Anderson's here because I completely trust them."

Outcome

By approaching the situation with a consulting mentality—providing an unbiased assessment of the current state and a clear roadmap forward—we steered what could have been a crisis into an opportunity for significant improvement.

The firm now benefits from enterprise-level IT support delivered with a personal touch, positioning them for sustainable growth without the vulnerability of relying on a single point of failure.