



Walter & Shuffain, P.C. Overcomes Taxing Spam and Archiving Challenges with Mimecast

Customer Vision

Walter & Shuffain, P.C. (WSCPA) is a top 20 public accounting firm in Massachusetts. The company provides comprehensive consulting, tax, estate and trust planning, as well as accounting, audit and fiduciary services, to individuals and business sectors, including real estate, professional services, healthcare, technology, manufacturing and construction.

Over the past few years, John LaTour, WSCPA's IT manager, has spearheaded a corporate initiative focused on making strategic technology investments that will help the company better serve clients and accommodate a hybrid work environment for both clients and employees. As part of this initiative, LaTour set out to find a cloud-based email security solution with spam prevention. He turned to Mimecast for the job, and quickly realized the company could provide so much more.

At a Glance

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Problem

Legitimate emails were getting hung up in spam filters, resulting in communications delays and business disruption, and spam emails were making it through to end users' inboxes, increasing security risk. In addition, the company's archive process was time consuming, complex and ineffective.

Solution

Mimecast Email Security, Internal Email Protect, Security Awareness Training, Web Security, Cloud Archive and Sync & Recover

Benefits

- Reduced number of false positive and false negative spam emails
- Ability to archive email communications without worrying about mail server size
- Ability to easily search archived emails
- Employee engagement in security awareness training
- Secure web browsing for both in-office and remote employees
- Secure and seamless email communications

Customer Strategy

“Given the nature of our business, we rely on email to serve our clients and fulfill day-to-day responsibilities, and we’re responsible for securing our clients’ personal and financial data residing in email communications,” says LaTour. “We were experiencing a two-fold spam problem with our previous email security provider that made all of these things a major challenge.”

LaTour says the first problem involved the legacy solution flagging and quarantining legitimate emails as spam, resulting in communications delays and business disruption. “Clients would call our accountants and business advisors and ask why they weren’t responding to an email, and we’d find the email in question in the spam filter. Our employees would then have to wait for the next day’s daily digest of spam to access the email or call me — and I’m the sole IT person responsible for managing approximately 100 end users.”

The second problem was false negatives: spam was making it into end users’ inboxes, increasing security risk for employees, partners and clients.

“We needed a new email security solution that would accurately sift through all emails, deliver legitimate communications to all stakeholders, and quarantine spam,” says LaTour. “After evaluating Mimecast, I realized the company could not only provide a stronger spam prevention strategy, but also a variety of other advantages, including simplified archiving, employee awareness training and web filtering.”

Customer Outcome

With Mimecast Email Security, end users can now access the spam filter on their own, at any time, and release on-hold messages to their inbox. LaTour notes: “This self-service functionality saves me a tremendous amount of time, and — more importantly — with Mimecast, I’m much less concerned about spam emails making it through to employees, partners and clients.”

In addition to spam prevention, LaTour is leveraging Mimecast Cloud Archive to transform the company’s archiving process. WSCPA uses an on-premises Microsoft Exchange Server, and prior to Mimecast, LaTour would export emails to .pst files and store them in-house. With compliance requirements mandating a seven-year retention period, the volume of archived email became so great that the mail server was growing too big and this “do-it-yourself” approach was becoming unmanageable. On top of that, searching for emails was extremely difficult and files would often get corrupted or lost.

With Mimecast Cloud Archive, LaTour eliminated this manual archiving burden. He configured the mail server with a 600-day retention limit, so all emails exceeding that timeframe are automatically archived. LaTour notes: “With Mimecast, we can track all communications sent and received — which is extremely valuable for not only client service, but also compliance and audit purposes — without having to worry about the mail server getting too big. And, no matter how many emails are archived, searching is so much easier.”

“I chose Mimecast to help us with spam prevention, and we’ve gotten so much more. Archiving is simple yet advanced, web browsing is protected, and employees are actually engaged in security awareness training. On top of these security benefits, Mimecast is helping us deliver best-in-class communications and client service.”

John LaTour - IT manager, Walter & Shuffain, P.C.

LaTour continues: “Mimecast also offers the ability to onboard and archive old emails, which helped me tremendously during our 2020 acquisition of Russell, Brier & Co. LLP. I simply exported their email from the previous 600 days into our mailbox and archived everything else. Employees could immediately pick up where they left off, and I could focus on the thousands of other IT and security issues that come along with an acquisition.”

LaTour notes that he’s leveraging Mimecast Security Awareness Training, and its impact on employees has been a complete surprise. “Every month, we send out Mimecast’s training videos, and it has transformed how our employees think about security. They no longer view training as IT’s attempt to catch them doing something wrong. They now look at it as an opportunity to grow their security awareness. I never expected employees to actually like security training, but they do. They’re engaged, they’re ready to learn, and they do their best to get the training questions right and to spot mock spam and phishing emails. As a result, the number of bad clicks has decreased significantly.”

LaTour is also using Mimecast Web Security to monitor and secure employees’ web usage, regardless of whether they’re in the office or working remotely.