

Your clients need your attention. Your IT should not compete for it.

A file that will not open. A meeting that starts with troubleshooting. A new colleague still waiting for access. C9 helps professional teams make the working day less complicated.



Illustrative imagery. This portfolio describes solution approaches, not a completed customer project.

Accounting firms · Consultants · Legal and advisory teams

Inside: everyday priorities, C9 capabilities, practical delivery and the next conversation.

THE WORKING DAY

The work is demanding enough without the workarounds.

Professional teams move between focused work, client conversations and shared deadlines. When files, permissions and devices are inconsistent, experienced people spend time solving problems that have little to do with their expertise.

Files scattered across the firm

Personal folders, email attachments and shared drives make it difficult to know which version to use and who should have access.

Work that moves with people

Home, office and client-site work need dependable sign-in and sensible access controls, without relying on personal devices by default.

Staff changes that leave loose ends

New starters need their tools ready. Departing staff need access removed and work handed over without losing the information the firm needs.

CAPABILITIES AT WORK

Make the working day easier to pick up and carry on.

Starting a client matter

The team needs a shared place for documents and clarity about who can see them. Collaboration tools and access groups are organised around the firm's ownership and confidentiality requirements.

Working between locations

A colleague joins from home while another presents from a meeting room. Managed devices, connectivity and meeting equipment support the same agreed working practices.

Bringing a new person in

A new starter needs files, email and calling ready for their first day. An approved onboarding checklist connects accounts, licences, equipment and manager sign-off.

Capabilities with a clear operational purpose.

The services, responsibilities and delivery plan are agreed around your environment.

Microsoft 365 & collaboration

Organise shared files, Teams and working practices around departments, projects and client confidentiality.

- Map where current documents live and who owns them.
- Design shared spaces and permissions around teams and work.
- Pilot any migration and explain the new working conventions.

What this contributes: People spend less effort finding the current document or asking colleagues for access that should already be defined.

[Explore Microsoft 365 & collaboration](#)

Identity & endpoint management

Review sign-in, access permissions and device protection, with a defined process for joining, moving roles and leaving.

- Review account roles, sign-in methods and device settings.
- Agree how personal and business devices may be used.
- Connect access changes to onboarding and departure approvals.

What this contributes: The firm has a repeatable way to give people the access they need and remove it when responsibilities change.

[Explore Identity & endpoint management](#)

Connect the tools to the way people work.

Office & remote connectivity

Check the network and connection behind cloud applications, video meetings and the way your people work.

- Review office coverage and connection requirements.
- Check the dependencies of cloud applications and remote access.
- Define what support includes for office and remote workers.

What this contributes: Working from another location is planned as part of the environment rather than treated as a separate workaround.

[Explore Office & remote connectivity](#)

Business calling & meeting spaces

Connect client calls and collaboration to agreed workflows, with room equipment and user readiness considered together.

- Review client calling and reception arrangements.
- Check licences and compatibility before recommending Teams calling.
- Test room audio, video and presentation workflows with users.

What this contributes: Client conversations and internal meetings can begin with less setup uncertainty.

[Explore Business calling & meeting spaces](#)

Support the people doing the work.

Managed IT

Bring day-to-day support, equipment records and planned improvements into a service scope the firm can understand.

- Record hardware, subscriptions and supplier contacts.
- Agree support priorities and responsibility with internal staff.
- Plan equipment changes and recurring issue reviews.

What this contributes: Partners and operations teams get a defined route for support and a clearer basis for future technology spending.

[Explore Managed IT](#)

Fee earners and delivery teams

Access and equipment organised around client work.

Practice or office managers

An onboarding and support process that does not rely on chasing several people.

Partners and directors

Visibility of priorities, ownership and planned investment.

Internal IT

A defined service partner for agreed support or project responsibilities.

A PRACTICAL EXAMPLE

A growing firm that has outgrown informal IT.

A firm adds people and a second office, but still depends on shared passwords and a colleague who knows where everything lives. The practical change is to document ownership and create a consistent working environment before growth adds more exceptions.

Illustrative approach, not a completed customer project.

Retain

Useful applications and equipment, subject to compatibility and supportability.

Organise

Shared information, access groups and device standards around the firm's work.

Make repeatable

New-starter setup, role changes, departures and the support process.

FROM PLAN TO HANDOVER

Bring the details together.

01 / Listen to the team

Find the recurring interruptions and the applications that matter to client work.

02 / Review the environment

Map devices, licensing, information access and supplier responsibilities.

03 / Introduce changes in stages

Pilot new settings and working practices with a small group before wider adoption.

04 / Support the new routine

Provide handover guidance and agree how support requests and future changes are managed.

KEEPING WORK MOVING

Plan for the interruption. Not just the installation.

A smooth working day depends on preparation, clear responsibilities and a usable response when something goes wrong.

Look after client deadlines

Sequence migrations and maintenance around known delivery dates, with validation and recovery steps agreed in advance.

Keep ownership with the firm

Document administrative accounts, licences and information ownership so essential knowledge does not sit with one person.

Check recoverability

Identify what needs to be restored, who owns the backup and how the agreed recovery process is checked.

BEYOND HANDOVER

Keep checking the things that matter.

Agree what to review against your starting position and service scope. Useful measures should reflect the work your team is trying to do.

- Repeated issues affecting client work
- New-starter readiness and departure completion
- Access requests caused by unclear file ownership
- Equipment and licence decisions approaching renewal

Review findings can inform the next change, a supplier conversation or a decision to leave a working system alone.

BEFORE YOU DECIDE

A few useful answers.

Can you work alongside our internal IT person?

Yes. Agreeing the split matters: C9 can support specific services or delivery work while your internal team retains its chosen responsibilities.

Do we have to move all our files?

No. First establish what is used, who owns it and which applications depend on it. Any migration should have a clear reason, access design and validation plan.

YOUR NEXT STEP

What keeps interrupting good work?

Tell us about your people, offices and the IT tasks that keep coming back. We will help turn that list into a practical plan.

Bring these details to the conversation

- Your locations, people and current technology providers.
- The interruptions or changes that prompted the review.
- Any planned openings, renewals or deadlines.

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