ACCELERATE PARTNERS

Case Study

Trusted Advisor + Trusted Advisor

=

Cloud Transformation Without Compromise

OVERVIEW

One of the clearest examples of the Trusted Advisor-to-Trusted Advisor model in action began with a large New Jersey-based credit union managing more than $4.53 billion in assets under management and employing over 500 professionals.

The organization operated production and disaster recovery environments out of traditional colocation facilities and was facing an increasingly common challenge: aging infrastructure, upcoming hardware refreshes, and a growing need to establish a cloud strategy without creating unnecessary operational risk.

A trusted technology advisory firm had built a strong executive relationship with the client but recognized that cloud infrastructure strategy and cybersecurity transformation required specialized expertise.

Rather than attempting to stretch beyond their core capabilities, they partnered with Accelerate Partners. The result was a multi-year success story that continues to create value today.

THE CHALLENGE

The credit union needed to answer several critical questions:

- How should they begin their cloud transformation journey?
- What path would minimize risk while delivering long-term value?
- Should production workloads move immediately to the cloud?
- How could they modernize aging infrastructure without disrupting business operations?
- Which provider offered the best combination of cloud capabilities, support, and financial value?

Leadership wanted a practical roadmap rather than a disruptive "all-at-once" migration strategy. For the incumbent trusted advisor, the opportunity was clear.

Protect the client relationship by bringing in specialists rather than trying to become specialists.

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OUR ROLE

Accelerate Partners partnered directly with the trusted advisor as an extension of their team, providing cloud strategy, supplier evaluation expertise, and technical leadership throughout the engagement.

Our role included:

Cloud Transformation Advisory
Evaluating the client's existing production and disaster recovery environments to identify realistic cloud adoption opportunities.

Technical & Commercial Evaluation
Facilitating both the business and technical review process across multiple infrastructure and cloud options.

Supplier Engagement
Leveraging deep relationships with the client's existing data center provider, whose cloud platform capabilities aligned well with the client's goals and operational requirements.

Executive Guidance
Helping stakeholders understand the operational, financial, and risk implications of different migration approaches.

Throughout the engagement, the client experienced one unified advisory team.
The trusted advisor maintained ownership of the relationship.
Accelerate Partners brought depth, experience, and cloud strategy expertise.

THE RECOMMENDATION

Rather than recommending a full-scale cloud migration immediately, the team identified a smarter first step:

Disaster Recovery as a Service (DRaaS)

By moving disaster recovery workloads to the cloud first, the credit union could:

- Reduce infrastructure risk
- Modernize its recovery platform
- Gain experience operating cloud environments
- Extend the life of existing production systems
- Establish a foundation for future cloud adoption initiatives

The approach provided measurable business value while avoiding the risks often associated with large-scale infrastructure transformation projects.

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THE OUTCOME

The results spoke for themselves:

- The client selected its existing colocation provider's cloud platform to support its Disaster Recovery as a Service initiative.
- The engagement resulted in approximately $35,000 per month of recurring cloud revenue.
- The trusted advisor strengthened its strategic relationship with the client.
- The client established a practical and low-risk path toward cloud adoption.
- Accelerate Partners helped facilitate a successful evaluation, procurement, and implementation process.

The success of the engagement also created a powerful second act.

Approximately one year later, when the client's colocation agreement came up for renewal, the trust built between the client, partner, supplier, and Accelerate Partners positioned the team for another strategic win. The resulting renewal generated an additional $20,000 in monthly recurring revenue on a 24-month agreement.

Today, Accelerate Partners is actively engaged in a cybersecurity evaluation initiative for the same client, continuing to help guide its technology modernization journey.

WHY THIS MATTERS

This engagement demonstrates that trusted advisors do not need to be experts in every technology category.
They simply need to know when to bring the right experts to the table.

Instead of risking the client relationship by attempting to deliver capabilities outside their core expertise, the partner chose collaboration.

The client benefitted from specialized cloud and cybersecurity knowledge. The partner strengthened its role as a trusted strategic advisor. The provider expanded its footprint. And Accelerate Partners delivered the expertise required to drive the initiative forward.

Everybody won.

THE BIGGER LESSON

This is the future of the channel.

Not consolidation. Not competition. Collaboration.

The most successful advisors understand that clients do not care who gets credit. They care about outcomes.

When trusted advisors intentionally partner with other trusted advisors, they unlock larger opportunities, deliver stronger client experiences, and compete more effectively against larger organizations with deeper resources.

The trusted advisor stayed trusted.
Accelerate Partners did what we do best.
The client achieved its modernization goals.
And together, we created a relationship that continues to generate opportunities years after the original engagement.

Trusted Advisor + Trusted Advisor = Better Outcomes for Everyone.

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