

CASE STUDY

# How Index Fresh Cut Fully Loaded IT Costs by at Least 30% After Migrating to Microsoft Azure with ZAG



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**Merrill Causey,**  
Chief Financial Officer, Index Fresh



[Index Fresh](#) is a worldwide marketer of avocados, sourcing from all major growing regions around the globe.

## HIGHLIGHTS

### CHALLENGES

- Partnering with an MSP, but experiencing limitations within their IT infrastructure
- Lacking control of ecosystem and tied to outdated systems
- Struggling with subpar ERP, but lacking autonomy to shift
- Suffering delays and downtime because support from third-party is deficient
- Getting distracted from business priorities as IT problems increase

# Challenges

## Limitations in technology infrastructure affecting productivity and scalability

As a global producer and distributor of avocados, Index Fresh's technology infrastructure is critical to its success.

Even small technical setbacks have the potential to cause lost productivity. Bigger system issues can escalate into lost orders, which competitors are more than happy to sweep up.



"Most agricultural products don't last a long time, so your systems need to be resilient, and your technical support fast and effective," says Index Fresh's Chief Financial Officer (CFO), Merrill Causey.

"If a customer calls you and your system is down, they're going to find somebody else to satisfy their order—and you'll never recoup that sale."

To keep its infrastructure running smoothly and maintain business continuity, Index Fresh had relied on the same Managed Services Provider (MSP) for over a decade.

But as the business grew, the MSP agreement that had worked well for years began to hold them back.

A number of issues were preventing them from meeting customers' expectations and scaling at pace:

- **Index Fresh's hosted infrastructure, controlled by the MSP, had limitations:** they were tied to outdated systems, lacked storage, and couldn't access key data and insights, which kept them from performing at their best.

## SOLUTION

Index Fresh partnered with ZAG as their Managed Services Provider, who:

- Provide system management and managed user support
- Advise on technology that improves margins, productivity and growth
- Managed migration to Microsoft Azure, which:
  - gives them greater control of ecosystem
  - enables rapid pivot to new ERP
  - delivers stable backbone for remote working
  - enhances security
  - creates better experience for users
  - Unlocks better insights and decision-making
- Support on ad hoc IT projects and ongoing business consultancy

## RESULTS

- 30% reduction in IT costs
- \$100k+ saved on high-level FTE
- Increased productivity across the organization
- CFO freed up to focus on core business, not IT issues
- Technology stack that gets business to their goals faster

- **They were stuck with a poorly performing ERP:** Index Fresh wanted to migrate to an ERP that better served their needs, but they didn't have the autonomy.
- **They relied on their MSP for networking and internet coverage:** when that service was sold to a private equity firm, support levels fell away—and Index Fresh was left with delays and downtime.

These limitations caused increasing operational pressures.

With data storage in short supply, Index Fresh had to think twice before pursuing new growth opportunities. Networking problems and sluggish support were also reducing their productivity.

Even more problematic, an under-performing ERP meant the company wasn't connecting the dots between critical business activities as seamlessly as they should.

Index Fresh needed to form a new MSP partnership with the ability to provide exceptional service, support, and strategic direction for the business.



“While I want us to be one of the most advanced tech companies in the world in our field, I don't want a whole lot of direct involvement. Yet, I was increasingly being pulled away from my daily priorities to deal with our IT issues,” says Merrill.

“To help drive more growth for the business, we needed an MSP that was responsive, proactive, and competent. A partner I could put my full trust in to support our IT needs.”

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## **Solution**

**New environment in Azure lays the foundations for higher margins, productivity, and growth**

Merrill learned about ZAG Technical Services when a trusted supplier joined the business. After a short phone call, he knew that ZAG offered exactly what Index Fresh was missing.



“I realized that ZAG is well respected in the industry, and proactive about technology management and strategy,” says Merrill. “I felt they offered what I needed: a partner who knows what they’re talking about and could act as my Chief IT Officer, providing quick resolution for every IT issue.”

As Index Fresh’s new MSP, ZAG would provide system management, managed user support, and ongoing strategic consultancy.

From day one, ZAG looked into Index Fresh’s business with microscopic precision, and advised Merrill on cost-effective technology updates that would improve their margins, productivity, and growth.

## Azure transition underpins dramatic improvements

ZAG's first big play was to recommend, and then manage, the migration of Index Fresh's files, systems, and servers to Microsoft Azure and Azure Virtual Desktop on the cloud.

By transitioning to Azure, Index Fresh:

- Gained greater control and access to their technology ecosystem.
- Pivoted to a new ERP in a matter of months. This enabled them to redesign business processes and make smart decisions based on the latest business intelligence.
- Gained a stable framework for reliable and secure remote working.
- Created a better user experience for employees.
- Enhanced their security and backed up critical data, so they're protected during a security event.
- Gained the capability to produce business reports that make complex data digestible for the C-suite.

Day-to-day, ZAG manages the Azure environment for Index Fresh, so Merrill can keep his attention on running the business, not running IT.



"Azure has solved many of our problems," says Merrill. "We used to have an issue with storage, but now it's massively scalable and secure. We used to have a problem with remote users not being able to access our files and system, and that's solved too."

Even better, with Azure unlocking better insights to inform their decision making, Index Fresh can scale more confidently, manage any workload increases efficiently, and even react to external market changes with less disruption.

## High service standards bring peace of mind

With system availability so important to business success, Merrill appreciates ZAG's turbo-charged response to support requests.



“One of my buttons is responsiveness—and ZAG is so responsive! I don’t think you could ask for better responsiveness from a partner,” he says.

In today’s IT landscape, where support can sometimes feel cold and robotic, Merrill appreciates ZAG’s human touch.



“A lot of times, IT people are very tech-savvy, but they don’t have those personal skills,” says Merrill. “With ZAG, they’re not only knowledgeable, they’re warm, personable people with expertise across every discipline you need.”

With users supported, and systems secure, reliable, and optimized, Merrill can finally forget about IT problems. Instead, he can concentrate on what’s important for the business, such as building financial resilience and developing strategies for long-term scale.



“The fact that I don’t get phone calls from IT users anymore is a Mount Everest-level result for me,” he says. “When I don’t get phone calls, I’m in heaven!”

### **Ad hoc support that drives better outcomes**

Away from the day-to-day, ZAG collaborates with Merrill at a business consultancy level. When Merrill has a business challenge to solve, ZAG advises on the right technologies and platforms to overcome it, and even turn it into a business advantage.



“Whatever I want to talk about, from international security, to opening up new locations or dealing with a specific problem in Texas, ZAG is always there to support me and they’re always going to have an answer,” says Merrill.

Another aspect of ZAG's service that Merrill values is its capacity to support ad hoc technology projects, even at the 11th hour.

In one example, Index Fresh hired a project manager to handle an office move. A week before the office went live, they saw a need for more support. ZAG rose to the challenge, sending two engineers to help with last-minute PC builds.

As a result, the organization was ready for business on Monday morning.

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## Results

**30% reduction in IT costs and a technology stack that supports business agility and scalability**

Since partnering with ZAG, Index Fresh has begun to leverage technology to meet its ambitions and goals. The business has boosted operational efficiency, saved tremendous time and money, and become more secure and resilient in the process.

Just on cost savings, the business has:

- **Reduced overall IT costs by at least 30%** compared to their previous provider
- **Saved \$100k+** by not replacing a high-spec IT consultant when they moved on. They didn't need to, because ZAG accomplishes the same work for less

As an experienced CFO, who knows what knowledge and talent costs, Merrill massively appreciates how ZAG lowers their cost of service.



“My IT costs have gone down considerably since working with ZAG,” he says. “They save you money because they’re on top of what’s happening in technology. They’re aware of promotions, they can consolidate systems and licenses, and they mesh things together and drive efficiencies in a smart way.”

With stable systems and responsive support now a given, nothing stands in the way of company productivity.



“ZAG are so knowledgeable and responsive, you’re not experiencing any downtime or hold-ups as they stumble around for answers,” says Merrill. “That’s been a big, big plus for me. And it has impacted our bottom line tremendously.”

The reduction in IT-related calls and distractions is another big win for Merrill.



“I save around three hours a month. While that may not sound like much, I was also delegating those problems to other employees, whose productivity was impacted because they had to resolve it,” he says. “In the past 12 months, I can count on one hand the number of calls I received.”

Merrill believes the value he receives from ZAG eclipses anything he could expect from an in-house hire.



“There is no way I could hire a single person—or even five people—who could be experts in all the areas that ZAG are,” he says. “I just call up ZAG, put them on any issue, and they come up with the answers.”




With Azure in place, remote work taken care of, and systems secure and fluid, Index Fresh has a renewed confidence to scale.

Merrill recommends ZAG to CFOs, IT directors and other decision-makers looking to build an IT ecosystem that gets them to their goals faster.



“I’m someone who expects the best out of the people and companies I work with. And ZAG has stepped up and delivered,” he says.

“I think ZAG is FAT: Faithful, Available, and Teachable. They’re faithful, because they stick with their employees. They make themselves available, which is unbelievable. And they’re teachable, in the sense that they want to learn what I do, so they can help me do it faster and more efficiently.”



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# Migrate to Microsoft Azure with ZAG today!

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