

# Morgan Creek Management – Virtualization in the Cloud Enables Seamless Remote Work

## About Morgan Creek Management Logistics

Morgan Creek Capital Management, LLC is a SEC-registered investment adviser providing investment management services to institutional and qualifying clients such as endowments, pension plans, foundations, and family offices. They provide customized investment solutions to clients in need of a targeted investment program, as well as discretionary strategies to assist clients in building investment programs based on the University Endowment Model. Morgan Creek is based in Chapel Hill, North Carolina with additional offices in New York and Shanghai. The company has a staff of 40 employees.

Since 2008, Nick Taylor, CPA, is the CFO of Morgan Creek Management Company and oversees the firm's IT services in addition to other responsibilities. He is a Certified Public Accountant and member of the American Institute of Certified Public Accountants and the North Carolina Association of Certified Public Accountants. Morgan Creek has always outsourced their IT requirements, and has been a Logically customer for five years. Prior to hiring Logically, Morgan Creek worked with another Managed Service Provider (MSP) but wanted to review the service offering to see if there could be cost and service improvements.

As a result, Morgan Creek developed a search for a new MSP through an exhaustive Request of Proposal (RFP), which Logically won based on the recommendations of another investment management firm along with the comprehensive services provided at a competitive price. Mr. Taylor said, "Logically is absolutely integral to our IT support and environment – they have the high level of skill we need at a more competitive price. No other MSP has been able to make that combination of technical competency at a fair price."

## IT Challenge

As the COVID-19 crisis hits the world, Morgan Creek needed to quickly adapt to the pandemic by having all of its employees work from home. "We moved to the cloud two years ago to accommodate offices in North Carolina, New York, Florida, the West Coast and our office in Shanghai, China, so we were already prepared," says Mr. Taylor.

Morgan Creek is a Microsoft shop and utilizes Logically for their engineering and project-based initiatives, including updating their firewalls and servers. Six months ago, Morgan Creek also completed a cloud migration to Microsoft Exchange. "I am not losing any sleep

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with Logically," says Mr. Taylor "And with the Logically team working on our business, the amount of time I need to spend with IT is pretty low."

Recently, Logically has been involved with three projects: updating the firmware for their access points, moving their Exchange environment to the cloud, and working on a file retention/backup solution which is required by the financial investment industry (Regulatory rules for Books and Records rules per the SEC requires 5-6-year retention).

## Moving Forward

"We have a huge advantage now dealing with the COVID-19 crisis since our firm is able to work remotely," says Mr. Taylor. The firm's applications are all hosted on a virtualized Citrix environment, which Mr. Taylor calls "a better mousetrap." Morgan Creek now has less

costly hardware end points as most of the employees use laptops. "It worked out really well. What we see in the office and at home is exactly the same," added Mr. Taylor. "In addition, since nothing is on premise, hurricanes and other natural disasters don't worry me anymore."

For firms that need to operate remotely, Mr. Taylor advises them to look at virtualization in the cloud. "If we didn't have it, we'd be scrambling. From a technology perspective, employees find it no different now that they are working from home," says Mr. Taylor.

One of the next projects Morgan Creek is considering is moving to a Voice Over IP (VOIP) environment for the company's phones. Morgan Creek has also benefitted from Logically's Security, Audit, and Compliance Services and is able to get assistance on cyber security issues from Logically's experienced team.

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**"Logically is arguably one of our most important vendors on the corporate side. They are absolutely essential to the smooth operation of our company. Having used Logically on multiple projects, we have consistently found their Professional Services team to be very talented and strong."**

**- NICK TAYLOR**

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