MY resource PARTNERS
TECHNOLOGY RESOURCES FOR BUSINESS

INSURANCE CLIENT STORY

INSURANCE BROKER

Year-round security testing, and $24,000 a year back in mobility savings

A Fort Lauderdale insurance brokerage needed stronger security in a highly regulated industry. We connected its offices and contact center, added 24/7 threat monitoring and continuous testing, and found savings along the way.



THE RESULT
$24,000
in annual mobility savings

$24,000
Annual mobility savings

24/7
Threat monitoring and response

Year-round
Penetration testing for less than one annual test

THEIR STORY

When you handle sensitive customer data, security can't be checked once a year and forgotten.

Our client is a leading homeowner's insurance brokerage based in Fort Lauderdale, operating in a highly regulated industry with strict data security, privacy and compliance standards. With administrative offices and a high-volume contact center, it depends on reliable, secure, integrated communications.

AT A GLANCE

INDUSTRY
Homeowner's insurance brokerage

FOOTPRINT
Fort Lauderdale, Florida; administrative offices plus a high-volume contact center

SERVICES
Phone Systems & Contact Center · Cybersecurity · Penetration Testing · Business Cell Plans

The challenges

- **Fragmented communications.** The administrative offices and the contact center operated in silos.
- **Limited visibility into threats.** Without proactive monitoring and testing, there were blind spots in its cybersecurity.
- **Heightened security and compliance needs.** Handling sensitive customer data required advanced threat detection, response and continuous vulnerability management.
- **Executive mobility gaps.** Executives needed secure, fully managed connectivity across phones, tablets, laptops and hotspots.

WHAT WE DID

The solutions

Our advisors built a multi-layered technology roadmap covering communications, operations and security.

One phone and contact center platform

We introduced them to a phone platform that integrates advanced office telephony with robust omnichannel contact center seats, for better collaboration across departments and powerful analytics for the entire company.

Managed detection and response (MDR/XDR)

24/7 threat monitoring and response, endpoint and network visibility, and rapid incident containment.

Continuous vulnerability scanning

Automated tools find and fix security gaps across the IT environment.

Subscription penetration testing

Replaced one annual pen test with continuous, on-demand testing all year, for substantially less than the single annual engagement.

Enterprise mobility

Fully managed cellular plans, device lifecycle management, secure hotspots, remote device management and rapid device deployment, saving $24,000 a year.

THE RESULTS

What changed

- **Operational efficiency.** Integrated communications reduced friction between administrative teams and the contact center.
- **Stronger security.** Real-time detection, continuous scanning and ongoing pen testing significantly reduced risk.
- **Compliance readiness.** Continuous testing keeps the client aligned with regulatory standards all year, not just at one point in time.
- **Visibility and control.** Central platforms show threats, vulnerabilities, device usage and costs.
- **Executive mobility with lower cost.** Leaders get secure access from anywhere while overall mobility spend went down.

> KEY TAKEAWAY
>
> Continuous testing outperforms point-in-time assessments, and central management of mobile devices didn't just improve security: it uncovered $24,000 a year in savings.

Is once-a-year security testing enough?

Let's review your security, compliance and mobility, and find savings along the way.

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