

# Investment firm streamlines security with Insight licensing solution

A leading international investment firm that advises clients on investments in real estate and private equity, looked to Insight to streamline its licensing.

Investment professionals deal with highly sensitive information, so they need reliable and secure technology. However, the company's security products were under a number of different licence agreements, which were time consuming to manage.

Insight consolidated all the security licenses into one cost-effective and easy-to-manage solution.

## The Challenge

As a global investment management company, this organisation has a reputation for identifying real estate and private equity opportunities in Europe and North America. This reputation relies on the networking capabilities and expertise of its investment professionals.

To fulfil their roles, the team relies on technology that allows them to work collaboratively without compromising on security.

The investment company were subscribing to a range of security products to protect its Microsoft Office environment, but these solutions were managed under multiple agreements. At the same time, the company was buying its Office 365 licences directly from Microsoft.

Each agreement had a separate cost element and renewal date, which was time consuming to manage and added to the workload of the busy IT team.

It was also proving a challenge for the Finance Director to forecast accurate licensing costs to factor into the company's budget.

The organisation needed a new licensing solution that would be easier to manage and more cost effective, while retaining the highest levels of data security for the team.



## Quick Overview

- An international investment firm focused on private equity, credit and real estate across Europe and North America.
- A strong working relationship was built with Insight, based on a track record of reliable technology supply.
- Investment firm called on Insight to provide strategic guidance to address its licensing challenges.
- Insight designed a solution which gave the organisation the security it needed under one Microsoft licence agreement.

## The Solution

The company had a strong working relationship with Insight, built on three years of reliable IT sourcing and supply. During this time, they had increasingly called upon Insight for strategic solutions, making Insight the obvious choice to address the licensing challenges.

Insight brought in its team of Licensing and Connected Workforce experts to investigate the clients' needs and design a solution.

The organisation recognised the value of the Microsoft M365 stack from a security perspective. However, purchasing an M365 E5 Licence, which offers enhanced levels of security, would not be cost effective for the company, as many of the applications included in this licence would not be used.

Insight recommended the purchase of an M365 E3 Licence with Microsoft Defender Advanced Threat Protection as an add-on product. This would provide the organisation with an enterprise endpoint security platform designed to prevent, detect, investigate, and respond to advanced threats.

To simplify the purchasing, Insight arranged for the client to buy the M365 licences with Defender ATP through a cloud solution provider (CSP) agreement.

The investment company now has access to a full range of Microsoft security features, along with Microsoft Intune and Defender ATP all in one place.

As the third-party security agreements were due to renew, the company needed a swift implementation of the new agreement. Following the initial conversation with the firm, Insight put the new solution in place within three weeks.

A Solution Sales Specialist from the Insight Connected Workforce team has provided ongoing support and technical expertise to enable the team to make the most of the new Microsoft features.

## The Benefits

- The organisation has retained the stringent data security it needs, using the Microsoft stack.
- The company's licensing is easier to manage, with everything covered under one licence with one renewal date.
- The licensing solution provides the investment firm with predictable costs, allowing for more accurate budgeting.
- A three-week implementation meant that the new solution was up and running quickly, avoiding disruption for users.
- Post-sale support has helped the client to encourage user adoption of the new Microsoft security applications.

## The Results Highlights



Insight worked with a global investment firm to deliver an easy-to-manage licensing solution.



The organisation has the high levels of IT security it needs, ensuring that clients' sensitive data is kept safe.



Insight identified the most cost-effective licensing solution— saving from unnecessary spending.



The Microsoft licence has one renewal date, which enables accurate budget forecasting.