



# Case Study



## Securing a remote workforce in Financial services

A global asset management firm with expertise across the credit spectrum, the company supports investors across a range of return objectives and risk appetites.

With offices in London, New York, Hong Kong and Sydney, its investors include pension funds, insurance companies, sovereign wealth funds, funds of funds, endowments and foundations, and private banks.

### Problem

As a risk-averse organisation operating in a highly regulated industry, the client needed a technology partner to support them in the right way to strengthen their security posture, ensure compliance and future proof the business.

### Expectations


- Embrace digital technologies to create a modern workplace.
- Enable collaboration through building a cloud-first environment.
- Provide remote workers with the tools they need to do their jobs.


### Results


- A secure, mobile workforce in a highly regulated industry.
- Control of data at all times, regardless of where people were working from.
- Simplified, optimised and correctly configured IT infrastructure on which to grow.



Atech has been very prepared at every stage of our digital transformation journey and very responsive to our cultural needs, demonstrating a raft of softer skills that ensured our modernisation initiative delivered a successful outcome that the whole team felt confident in.”

 **Industry:**  
Investment management

 **Location:**  
UK HQ, global operations

 **Number Of Users:**  
300+



### Asset management firm achieves the cultural change necessary for successful digital transformation with Atech

The world of investment management is highly regulated, creating a tough environment for organisations to operate under its strict governance, risk and compliance measures. As a relatively large player in the market, with a strong, well-established reputation, the client was under more pressure than most.

As risk-averse organisations, asset management firms operate with precision to ensure perfection with every decision. When evaluating technology, the organisation runs various scenarios to consider the possible risks and outcomes. There is a real risk of missing out on technology's wider possibilities.

Then the new CEO entered the organisation, they saw the opportunity to embrace digital technologies to create a modern workplace.

Enabling collaboration in a cloud-first environment, they wanted to mobilise the team, and create a digital workforce, moving away from the constraints of the expectation of presenteeism.

However, answering the question of how to enable this digital transformation, while keeping business-critical data centralised and maintaining a robust security posture – all against a backdrop of intense regulatory requirements – was something he couldn't do alone.



Our biggest challenge was transforming the culture and becoming a scalable, digital workforce. Atech has been able to deliver this in a way that is secure, and now anyone can work from anywhere without compromising data.” CEO, Global Asset Management Firm

### Addicted to service for a confident outcome


Impressed with Atech's knowledge and specialist skillset, the client appointed the multi-gold Microsoft partner and cloud service provider (CSP) to support the company on its digital transformation journey. And it has been a journey rather than a destination, as the relationship has evolved, building greater levels of trust, and each tentative step on the roadmap taken only when ready.

So often, digital transformation focuses on the technology, but it's equally concerned with process and people – to be successfully implemented and adopted, all 3 must be taken on that journey.

Therefore, Atech took an agile and flexible approach to delivery, focussing on how to match the client's culture and meet key stakeholders' expectations.

As a risk-averse organisation, it was essential that Atech adapted its communications to demonstrate the attention to detail, ensuring the team was crystal clear about what was/wasn't included within each step and why, with place markers added for future work that could enhance the outcomes further.

With several stakeholders in the process, this often involved creating additional layers of communication, such as high level board summaries and comprehensive technical documentation to ensure everyone was equally invested in the outcome. As well as twice-weekly calls to update the whole team on progress and highlight any potential issues that needed addressing. Together, Atech and the client moved towards a secure, scalable and successful modern IT infrastructure.



A cloud-first, mobile-first approach for a modern workplace

## To date, the steps that the client has taken towards its digital transformation include:

### Baseline security

Reviewing the existing set-up to validate the current configuration and identify any vulnerabilities or configurations which could be optimised for better performance and brought in line with best practice. Then implementing baseline security configurations within the existing Microsoft 365 licensing suite.

### Cloud mitigation

Following a cloud readiness assessment, Atech developed a virtual machine template with automation using secure best practices, which was deployed to Microsoft Azure, with advice shared on how to best govern and secure the future environment.

### Modern Desktop

To help enable the remote workforce, Atech ran a pilot to implement a modern management and deployment framework, involving a global Windows 7 device migration to Windows 10.

### Windows Virtual Desktop deployment

Replacing the existing on-premise VMware VDI, Atech simplified IT management and helped the client access optimisations for MS 365 while supporting Remote Desktop Services environments.

### Teams deployment

Creating a central hub for teamwork - including workplace chat, video meetings, file storage and application integration - so people, including those external to the organisation, can securely and actively connect and collaborate in real time to get things done.

Through its digital transformation and infrastructure optimisation assessments, financial services organisations can attain a completely mobilised workforce who enjoy a personalised, faster and seamless desktop experience through virtualisation, with added layers of highly customised control and security to ensure the organisation remains protected.

Atech has enabled clients in the sector to create the next version of its business, which:

- Leverages a range of enterprise-grade, security and compliance features, which enable the organisation to have clear access control and full governance of its data.
- Improves the company's security posture by validating and correcting the current configuration to take advantage of existing capabilities.
- Takes full advantage of the performance benefits and cost savings offered by the cloud through migrating workloads to better connect people and facilitate deeper collaboration.
- Simplifies the overall management of the IT infrastructure and provided greater visibility to enable the organisation to continually optimise it and futureproof the business.

## See how Atech can support you

Creating a Modern Workplace is always about more than the technology. You have to consider the process and people changes required to ensure the final outcome fits within the organisational culture, so it is accepted and successfully adopted after roll-out.

Every business faces its own challenges, and the regulatory frameworks within which you operate only add to the pressure you experience.

Therefore, we work with our clients to maintain control of their data and increasing their security posture. We take a highly customised approach to deliver what the business needs to achieve from digital transformation, and tailor how it's best communicated within the business. This is all part of the Atech service.

For further information about creating a Modern Workplace, download the complimentary e-book 'How to create a Modern Workplace in Financial Services'.