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CLIENT: Confidential

PROJECT: Case study audit

OBJECTIVE: Identify areas for improvement in existing
customer case studies for a business-
technology solutions provider looking to
better convey its value

SUMMARY: This document extract contains select pages
from the audit findings

Number One Threat Vector - Email

A Carolina based regional credit union engaged [Client] to assist with the deployment of cohesive Email Security Solution. The services provided by [Client] focused on moving features and functionality off legacy platforms, as well as implementing best practices to keep up with emerging email security threats.

Their existing email security design was antiquated and did not have the features and capabilities to keep up with the latest email security threats. The hardware supporting the platform were taxed and regularly stopped passing emails, requiring a reboot of the hardware.

Phishing attack attempts have been consistently the primary channel that breaches materialize. The financial cost to remediate and rebuild customer trust in the financial industry is immeasurably high and unacceptable to ignore.

Client Logo

After wrapping up a comprehensive discovery of the environment, a [Client] security consultant met with key personnel to review best practices that would be implemented, as well as the integrations required to get the most value out of the solution.

The solution exceeded the client's expectations and the business' objectives, in the following ways:

- SaaS architecture improved service availability with no service interruptions to date (6+ months)

- New security features / capabilities greatly reduced the number of phishing attempts that have reached end users

- Outlook security plugin has lowered service desk tickets, freeing up valuable resources to focus on other priorities

From discovery to implementation, [Client] was able to deploy, document, and handoff an industry leading email security practices to a satisfied customer in less than three weeks. In that short period, [Client] was able to document current configurations, uncover dependencies, listen to the client's requirements, design a custom fit secure solution and implement it without service interruption.

Add a descriptive title and takeaway that conveys the main message.*

Avoid capitalizing general terminology ("Email Security Solution") unless it's the formal name of a product/service.

Good story overall, but be careful of flow. The issues described in paragraphs 2 and 3 should come before [Client] is introduced in paragraph 1 as the team called on to solve those issues.

Double-check for typos, grammar, etc. In these two examples, *business'* should be *business's* (add possessive "s"), and *handoff* should be *hand off* (action verb rather than noun form).

Quantify the results as much as possible, similar to the first bullet about no interruptions for the first 6 months (e.g., reduced the number of phishing attempts by x%, lowered service desk tickets by half, etc.).

The description of the solution at the bottom should come before the results of that solution (which are currently in the second section).

* All observations in these pages apply to all case studies but have only been pointed out once to avoid redundancy.

DISASTER RECOVERY

For this customer in the banking industry, business is BOOMING.

So much that they plan to double the size of their bank over the next 3-5 years. The customer knew it was vital that the technology landscape was prepared to handle that type of growth. After hiring a technology director with specific expertise in growth within the banking industry, project planning began.
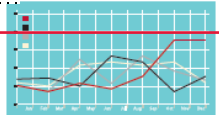
First, the new technology director interviewed and shared his vision to five different technology consultants in order to get a great understanding of the 'who' in the community.

After review, Client was selected based on the 'WOW' impression that was made with their hands-on approach.

Client Logo

One of the first goals was to modernize their primary data center environment. Once the customer began to build a relationship with Client engineers, he was reassured of his selection of the partner and even added a disaster recovery site to the three-year plan, which nearly doubled the size of the project.

PROJECT MANAGEMENT THEN GRABBED THE WHEEL, THE MODERNIZATION INITIATIVE WAS UNDERWAY AND Client ENGINEERING PLUGGED IN. KEEPING IN MIND FUTURE GROWTH OF THE ORGANIZATION, SECURITY, COMPLIANCE AND CUSTOMER REQUIREMENTS, Client ENGINEERS WORKED TO HIT DEADLINES AGREED UPON BY BOTH TEAMS. AFTER THREE SHORT WEEKS, THE PROJECT WAS COMPLETED SUCCESSFULLY, DOCUMENTATION WAS THOROUGH AND THE CUSTOMER WAS TRAINED ON THE INNOVATIVE TECHNOLOGY. SHORTLY THEREAFTER, THE CUSTOMER AND Client SALES TEAMS BEGAN PLANNING THE NEXT PHASE OF PROJECTS IN DIFFERENT TECHNOLOGIES THAT WOULD BE INSTRUMENTAL IN SUPPORTING THE CUSTOMER'S PROJECTED GROWTH INITIATIVES.

CISCO vmware®

There's a disconnect between the title (disaster recovery), opening line (business is booming), perceived problem (tech challenges with rapid growth), and solution (disaster recovery site wasn't part of the original project). The storyline needs to be more cohesive.

The "problem" of the customer's business growth is vague, and therefore the reason for interviewing technology consultants is also vague. Need to provide a strong setup so that it's very clear why Client came on board and how it solved the customer's problem.

"Once the customer began to build a relationship with Client engineers…" – avoid unnecessary filler language that doesn't advance the story/message.

"After three short weeks, the project was…documentation was…the customer was…" – use active voice instead of passive voice as much as possible to simplify sentence structure and make the language more powerful. Sample rewrite:
"After three short weeks, the teams thoroughly documented the project's successful completion and Client trained the customer on its innovative new technology."

STUDY #3

LAW FIRM DATA CENTER

This Law Firm was looking for a new backup solution to support their Data Center.

It was a common practice that lawyers asked to find historical and relevant cases that would directly apply to the case they were working. Typical turnaround time was 24 hours, which would force the IT staff to work late night hours, especially if the request came at the 11th hour.

When contemplating a new platform, there were several items to consider. It seemed like the current provider was behind from a cloud perspective and would typically drive up the cost of 5th year maintenance, which would've forced the customer into a tech refresh.

Client Logo

Client: ALREADY HAVING A STRONG RELATIONSHIP WITH THE CUSTOMER, WAS ABLE TO BRING A NEW SOLUTION TO THE TABLE. THIS SOLUTION OFFERED:

• A small physical footprint
• Low maintenance cost
• Two hour installation
• Searchable records
• DARE
• Cloud flexibility

THE NEW SOLUTION, RUBRIK, WOULD ALLOW LAWYERS TO SEARCH THE CASES NEEDED, WHILE KEEPING THE IT STAFF FOCUSED ON PROJECTS AND APPLICATIONS THAT MAKE THEIR BUSINESS MORE PROFITABLE. THIS NEW SOLUTION HAS BEEN A SUCCESS AND HAS ALSO PUT TIME BACK IN THE DAY TO KEEP A BETTER WORK-LIFE BALANCE, WHICH WAS ALSO A LARGE PRIORITY.

rubrik

The storyline could be more cohesive. It's not clear how their situation ties to the new platform until the very end – i.e., what do the case study work and quick turnarounds have to do with backup solutions. Also consider providing slightly more detail about the law firm's size, field, or other specs that may be relevant to prospects reading this.

"It was a common practice that lawyers asked…" – no reason for past tense here. Sample rewrite:
"Lawyers are commonly asked to find relevant cases that apply directly to the ones they're working. Typical turnaround time is less than a day, which can lead to late hours for IT staff (especially for last-minute requests)."

The graphics are on-brand, but double-check that there's proper spacing around them (this example shows an overlap with the text).

Use all caps sparingly as this makes paragraph-sized text harder to read.

Quantitative results here would be particularly compelling if available (e.g., productivity metrics, how much time saved, etc.).

OTHER STUDIES: GENERAL OBSERVATIONS

HEALTHCARE

A Carolina based hospital was facing an aging phone system that had a large annual maintenance contract associated to it. They were also looking to build two additional buildings that would host 1500 additional users.

When they evaluated cost, it was more effective to sign with the Enterprise License Agreement rather than continuing maintenance costs on the older phone system. This would also be a smoother transition to adding new users. They also received all analog users included for FREE, which due to the larger number of analog phones throughout hospitals, this cut licensing cost dramatically. Seems like an easy decision, right?

Client Logo

Through this process they were able to set the foundation for Cisco Emergency Responder, which is included in the ELA and is an e-911 dialing platform for VoIP phones.

As a result, this hospital received all the necessary video licensing to allow them to start a new telemedicine initiative. This included using endpoints and WebEx for a home health program, as well as endpoints for some employees to start as a pilot.

LASTLY, THEY BUILT A LARGE MEDICAL OFFICE BUILDING TO ACCOMMODATE SEVERAL BUSINESS UNITS CONSOLIDATING TO ONE LOCATION. IN THIS BUILDING, THEY UP-FITTED ALL CONFERENCE ROOMS WITH VIDEO UNITS, ALL OF WHICH DID NOT REQUIRE ANY LICENSING AS IT WAS INCLUDED IN THE ELA. THIS WAS A BUSINESS SOLUTION THAT JUST SIMPLY WORKED!

Cisco webex

SECURITY ELA

Over the past three years, one of our customers has been implementing & consuming multiple technologies through the Security Enterprise License Agreement. Offered by Cisco Systems through Client, the Security ELA has greatly reduced the risk profile and level of exposure.

Acceleration is what Client's Account Manager has defined as the main difference of why Client adds such a tremendous value to the ELA Program. The Account Manager and team Technical Consultant have taken time to truly connect with their customer and not just within the IT Department. They've found that this is key when understanding the security strategy of an organization, rather than simply checking through a list of boxes.

Client Logo

Once the Client team worked through the customer's Data Center Team, Cloud Architect Team, Security Team and Network Infrastructure Team they were able to truly understand the strategy, as well as do a comparison to offer the Security ELA, which in three years would provide over a $900k savings.

A large part of finding the return on the investment of an ELA is to make sure the technology is implemented and absorbed in the first year, and that's where Client is able to excel.

With this project, it wasn't the technology that gave Client a competitive advantage, but rather the Engineering and Project Management Office that really kept the ship moving.

This customer's security posture has matured greatly over the last three years. The increased need and visibility within this organization, coupled with leadership and technology, has created a robust program to manage their risk level.

FURTHERMORE, OVER THE LAST YEAR, THIS SPECIFIC CUSTOMER HAS REORGANIZED THEIR SECURITY PROGRAM TO ENCOMPASS THE TRADITIONAL INTERNAL IT INFRASTRUCTURE, ALONG WITH THEIR CUSTOMER FACING ENVIRONMENT, TO BRING HARMONY ACROSS GLOBAL SECURITY INITIATIVES.

THE SECURITY ELA HAS ENABLED A RAPID DEPLOYMENT OF SUCCESSFUL SECURITY STRATEGIES TAKING ADVANTAGE OF THE ELA'S ABILITY TO SCALE ORGANICALLY WITH THE BUSINESS THROUGH BOTH ORGANIZATIONAL CHANGES, AS WELL AS M&A.

Secure Identity & Access Control

A global commercial bank engaged Client with the deployment of an industry leading access control solution to provide greater integration and security for their Remote Access Users in addition to centralized control and management of their network devices.

The state Cyber-Security Requirements for Financial Services Companies was updated in March 2017. Client responded to a request from their CISO to mitigate many of these new regulatory points by successfully recommending a compliance-centric solution to meet many of the in-network and out-of-network Security requirements.

Client Logo

This client had a very simple remote access implementation in place but they were using non-supported hardware and software and had no logging functions/capabilities. In the initial discovery Client determined a backdoor was found into the network, which the Client Engineers successfully identified, documented and helped direct the client to close the security hole.

Client provided ongoing support to the client to help ensure each remote access user was successfully able to connect securely to the client's network. Client also provided training and support to help ensure ongoing success of the deployment and how each part allows them to meet both business security and regulatory requirements.

From the initial engagement, to identifying complications and security concerns across the environment, to designing, documenting and implementing a complete solution Client was able to successfully assist with validating and passing an Audit for the state's new Cyber-Security requirements.

Except for the logo on the page, there's no mention of Client at all. The study reads as though the client did everything itself. Need to integrate Client and be clear about its role in the project. Also, keep an eye on voice, which departs from your other studies in certain places (keep it consistent).

Specific results should all go at the end, and bullets would make them easier to feature/read. The $900k in savings is a strong, quantifiable metric that can be called out either in a graphic and/or as part of a takeaway statement below the title at the top. Also, use consistent point of view (3rd person is preferable over 1st person for case studies).

Simplify the language significantly. The study's Flesch-Kincaid readability score is 19.5. This score translates to grade level, with 6.0 to 8.9 (6th to 8th grade) being the best-practice range for reader-friendliness among a wider variety of audiences.