



**SkyTide**



# CASE STUDY

## SCALABLE REMOTE IT

Empowering a Local Insurance Agency with a Scalable Remote IT Environment.

# OVERVIEW

A local Farmers® insurance agency needed a secure and efficient IT environment to support remote operations. The agency's new owner, eager to modernize operations and ensure business continuity, recognized the growing importance of secure remote work.



## THE SITUATION:

Without the right technology stack in place, the agency risked productivity slowdowns, data security vulnerabilities, and disruptions to client service.

They needed a solution that would allow agents to work seamlessly from anywhere while maintaining compliance and protecting sensitive information.

As a newly acquired business, the agency's leadership saw this as a critical opportunity to modernize their operations, future-proof their infrastructure, and ensure uninterrupted service for their growing client base.

“In the financial industries, trust is everything—and that extends to your technology. Our job at SkyTide is to make sure firms like this one are not just secure, but agile, compliant, and ready for whatever comes next.”

- Sam Card, COO at SkyTide Group

# A CLOUD-FIRST APPROACH

After evaluating several providers, the insurance agency chose SkyTide Group for our ability to implement a fast, seamless, and scalable solution that integrated with their existing cloud-hosted software.

## **Our solution included:**

- **Cloud Migration:** Migrated their operations to Microsoft 365, giving agents centralized, cloud-based access to email, documents and communication tools.
- **Cloud Device Access:** Agents can now work securely from any device, with data fully synchronized across platforms.
- **Built-In Security & Compliance Features:**
  - Multi-Factor Authentication (MFA) to block unauthorized access
  - Cloud App Security for threat detection and monitoring
  - Data Loss Prevention (DLP) to protect sensitive client data
  - Email encryption and sensitivity labels to secure communications
  - Role-based access controls and audit logs for compliance visibility
- **Business Continuity & Disaster Recovery Planning:** Cloud backups, data replication, and redundant systems ensure uninterrupted operations in the case of a crisis.

# THE RESULTS

Today, this insurance agency operates with a flexible, secure, and scalable remote work environment that empowers agents to serve clients anytime, anywhere. Their technology now supports not only business continuity during unexpected disruptions but also long-term growth.

The team can:

- **Collaborate securely from anywhere:** Agents stay connected and productive from anywhere, with secure access to shared files and communication tools.
- **Minimize downtime and IT costs:** Cloud infrastructure reduces reliance on physical hardware, lowering overhead and improving reliability
- **Ensure service quality and compliance:** Built-in security features and compliance controls protect sensitive data and uphold industry standards..
- **Scale operations with ease:** The Microsoft 365 platform grows with the business, making it simple to onboard new agents or expand to new locations.

# AT A GLANCE



## Industry

Insurance (Home, Auto, Life)



## Challenge

Needed a secure, remote-ready IT environment to support growth and compliance.



## Solution

Cloud migration to Microsoft 365 with built-in security and business continuity tools



## Key Results

Improved flexibility, reduced downtime, and strengthened regulatory alignment



## Services Delivered

Cloud migration, compliance-focused security, backup & disaster recovery and remote access enablement.

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