

By
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Don't panic!

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Hosted software solutions, virtualization, and trends such as BYOD (bring your own device) have given organizations lots to think about when deploying new hardware. With approximately 100 agents in the field and mounting concerns about the security and privacy of the company's current hardware fleet, Joe Alvarez, VP business development and operations at FaithLife Financial, needed to find the best path to trustworthy client computing.

FaithLife Financial is a Waterloo, Ontario-based Christian, not-for-profit, member-based financial services organization. Agents provide insurance and investment services to over 33,000 members across Canada. The organization reinvests a portion of its earnings in programs that support its members and communities as well as people in need worldwide.

FaithLife agents had older machines in the field and FaithLife, like the rest of the financial services industry, was facing growing regulation around the privacy and security of data. Alvarez said the company had begun investigating an upgrade to Windows 7 and encryption based on that operating system. FaithLife's current encryption, based on Windows XP, was safe but expensive to maintain.

"As we started to upgrade the machines we started thinking, 'this is good, but is this the right way to go?'" Alvarez said.

When some of the agents discovered Markham, Ontario-based No Panic Computing (NPC), they immediately recognized that NPC might be a perfect fit for FaithLife's computing needs. NPC provides managed notebooks and offers outsourced deployment, setup and continuous protection services. NPC's offerings range from highly-mobile 12.5" notebooks to large-format 15.6"

laptops. The products are also available with integrated Rogers Rocket mobility, so agents that choose this option are able to connect to Rogers' 4G HSPA+ where available.

After deciding to proceed with a pilot to test the viability of implementing a full NPC environment, Alvarez found that FaithLife would require extensive customization of the default notebook image. FaithLife needed its custom software, including CRM, an illustration system and custom Outlook extensions, to be integrated into the new machines. For his part, Alvarez wanted agents to get a machine that was personal while still being deployed by a third party.

Although NPC does have a managed tablet and desktop offering, FaithLife wanted its field staff to stick with notebooks and gave its agents the choice of small, medium or large laptops. Before deployment, the three machines were tested in an in-house project.

"We tested to make sure they were identical and that they would run our software identically," Alvarez said.

The second phase of the pilot program involved dispatch of uncustomized machines to select district managers and agents to test the need for customization. NPC ended up building a custom login screen for FaithLife agents. The organization's illustration system and other custom applications are also available "out of the box," helping agents to gain a level of familiarity with the devices right away.

The NPC solution provides a good balance between accepting new trends such as BYOD, mobility and cloud and maintaining control over FaithLife's data. These are not hosted devices – all data resides on the clients – but data is backed up to a secure location by NPC, which Alvarez said was an important piece of the solution. Since agents are independent, FaithLife wanted



Joe Alvarez, FaithLife Financial

them to own the devices but a certain level of control needed to be maintained. In the event that an agent leaves the company, NPC can lock-down the device until corporate data can be removed. Agents maintain their personal data, and FaithLife retains control of its confidential information.

Training on security best practices and even basic computer tips were also provided to FaithLife agents by NPC. Alvarez said the training was welcome because FaithLife's own trainers needed to focus on teaching agents sales techniques, rather than about security and privacy. FaithLife's agents are now also protected with 24-hour technical support from NPC; previously, many agents in Western time zones were not able to access support during hours when the Eastern headquarters was closed.

Although the FaithLife deployment is still in its early stages (the initial deployment began January 1, 2012) the NPC solutions already brings some structure to security and FaithLife can now easily make the case it is a privacy-sensitive organization. ■