

How GoldSky helped Compliance Solutions **develop a security-focused tech infrastructure, obtain SOC certification to **win bigger contracts,** and **implement processes** to create a more **stable, secure company****



“We’ve come an incredibly long distance in improving our security measures and GoldSky has helped us get there. Not only are we able to get bigger clients that see our certification status, but we also have better processes from which to run our business. Having sustainable business practices is such a critical thing — they’re a huge value when they’re there and a huge risk when they’re not. It feels great to know that we’re continuously developing into a really stable and secure company.”

— **Dan Barber**
CIO, Compliance Solutions



Compliance Solutions provides tax and compliance services to businesses of all sizes, with an emphasis on telecommunication companies.

HIGHLIGHTS

Challenges

- Needed expert help to develop an enhanced technology infrastructure that had a security-focused foundation
- Needed to obtain SOC certification in order to win a large contract from a prestigious new client
- Needed standardized security processes that makes running the business easier as well as helps them become a more stable and secure company

Solution

- A team of world-class technologists and cybersecurity experts who specialize in cybersecurity, compliance, and privacy-related issues for small to mid-size businesses

Results

- Completely revamped their technology environment with a focus on security
- Became SOC-certified in record time, which has allowed them to win contracts with several large clients
- Standardized and sustainable security framework and processes that's led to increased confidence and peace of mind
- On-going support and a wide range of cybersecurity expertise thanks to an affordable and outsourced CSO solution

Challenges

Creating a new tech environment that was focused on security, plus gaining SOC certification to secure bigger clients

When Compliance Solutions was introduced to GoldSky Cyber Security Solutions back in 2017, the technology side of their business was going through a complete overhaul.

Most of their tech equipment was end-of-life and the company had also faced some security concerns, which led to their decision to **revamp their tech environment from its infrastructure up — making sure that along with new equipment, they were also adding in a much higher level of security and compliance.**

Around that same time, Compliance Solutions — who provides tax and compliance services to telecommunication companies — stood poised to secure their first large contract with a high-profile company, as long as they were SOC 2 certified.

The only issue was: they weren't.

Dan Barber, Compliance Solutions' CIO, said that while he had a firm plan for how he wanted to upgrade and restructure the company's tech environment, he had little idea what needed to be done to enhance their security protocols as well as gain SOC compliance as fast as possible.

"I knew I wanted to rebuild our infrastructure with security and compliance as our foundation, but I'm not a compliance guy by nature," Dan said. "My role is a technologist. I need my technology to work and I need to create a safe and secure environment. But to be honest, I knew nothing about compliance."

“SOC compliance encompasses business operations, framework, control sets, and other things that are outside of my technology realm. We needed to find someone who understood compliance, **because we were in line for contracts with much larger clients, and without the certifications that they wanted us to have, they could’ve easily taken their business elsewhere.**”

So, Dan started searching for an expert who could help. He met with a number of Managed IT Service Providers (MSPs) as well as several compliance specialists, but struggled to find the right fit for his needs.

“The MSPs didn’t know what SOC was and the compliance specialists were hard for me to relate to,” Dan said. “They were very process-oriented and, as a technology guy, my language is firewalls, WAFs, routers and switches. They also didn’t seem very confident that they could tackle our security and compliance in the way I really wanted to. I realized that without the right partner this was going to be a tough battle.”

Solution

A world-class team of cybersecurity experts who not only assess — but remediate — your security and compliance challenges to the highest regulation standards

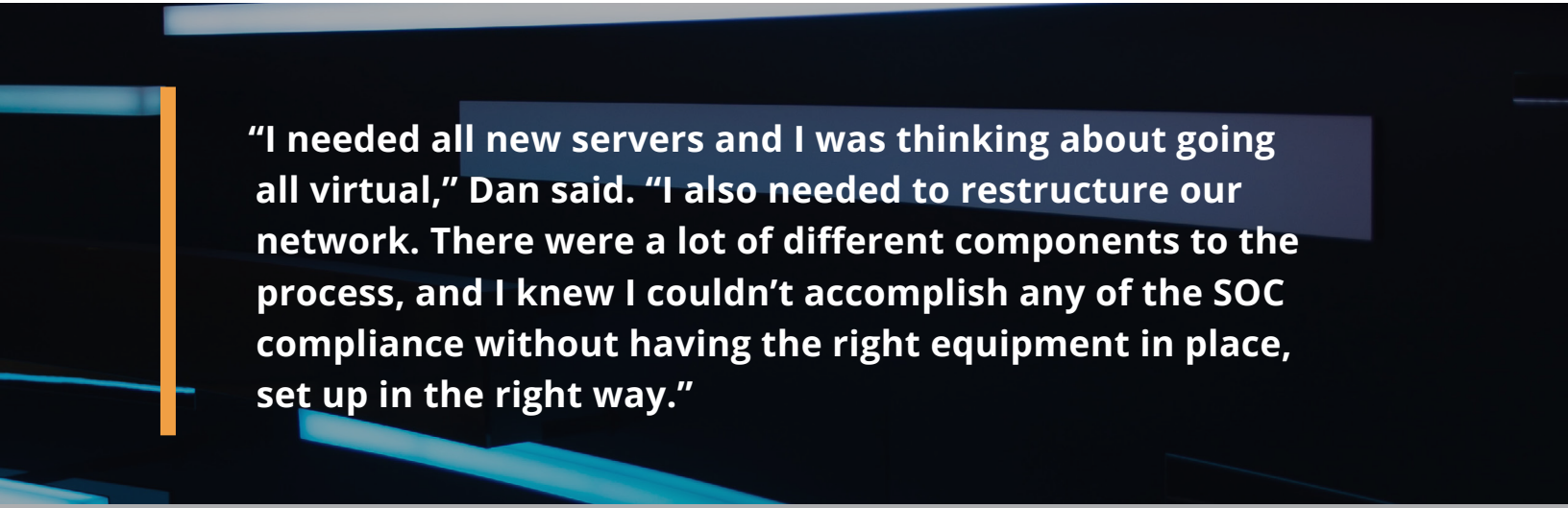
Dan said that, thanks to an indirect connection through his wife, he was put in contact with Ron Frechette, the CEO of GoldSky.

It didn’t take long for him to recognize Ron’s passion for providing cybersecurity to small businesses like theirs, and **he was impressed by the way Ron demonstrated his knowledge of security and compliance instead of just making a sales pitch.**



“Ron is a great evangelist for why small businesses need cybersecurity,” Dan said. “He talked about it in a way I could relate to, and he was able to demonstrate his knowledge so that I could really see GoldSky’s strengths. I felt very confident that GoldSky had the resources to tackle our challenges — and after talking to him I felt like I was in great hands and had found a partner who could help me.”

Dan said that, after his work with GoldSky began, most of the initial conversations revolved around how to make Compliance Solutions’ tech environment and network more secure. He knew that before the company could increase their security and compliance, however — and specifically obtain their SOC certification — they would need to make the necessary upgrades to their tech equipment.



“I needed all new servers and I was thinking about going all virtual,” Dan said. “I also needed to restructure our network. There were a lot of different components to the process, and I knew I couldn’t accomplish any of the SOC compliance without having the right equipment in place, set up in the right way.”

For Compliance Solutions, that looked like replacing two full network segments, going from 25 hosts down to 9 that were all segmented out as individual networks.

Dan said that once that infrastructure was in place, **they worked with GoldSky to map out what security measures they needed to incorporate** into it, as well as what needed to be accomplished to become SOC certified.

That process, led by GoldSky COO and managing partner Jonathan Cox, unfolded on a very tight timeframe of approximately 12 months. Dan said that because of Jonathan's expertise and his ability to come up with a game plan that prioritized the most critical components of the process effectively, they were able to successfully pass their audit and achieve their certification status.

"Having Jonathan jump in and see what needed to be done as well as figure out what needed to happen before the audit is a testament to his expertise — and his diligence to make it happen," Dan said. "It was a very quick turnaround compared to how long the SOC certification process normally takes."

With the audit behind them and their SOC 2 certification achieved, Dan said that Compliance Solutions' founder Mark Lammert realized that the cybersecurity and compliance standards the company wanted to maintain were going to require a continued commitment.

"It became very clear to Mark that this was a long-term endeavor," Dan said. **"Cybersecurity is not just a plug-it-in-and-forget-it type of thing — it's a journey."**

So, the company signed up for GoldSky's CSO as a Service Program and has continued to benefit from Jonathan's talent and skill — as well as that of the entire GoldSky team — which Dan said has been quite a seamless experience.

"Jonathan has integrated into our company really well," Dan said. "I see him in the office about once a month, and I have phone calls with him as often as necessary for the initiative we're pushing through, or if we have concerns."

"He also helps us get our logs together and anything else we need to have ready to show the auditors whenever we have audits."


Results

Bigger clients and more peace of mind thanks to a security-focused tech infrastructure and standardized security framework

Dan said that the results their company has experienced through their now multi-year partnership with GoldSky have been great, and he's also thrilled with what their work together has done for him in his role as CIO.

"We're able to get bigger clients that see our certification status, so our work together has been very valuable in that respect," Dan said. "But for me personally, the biggest benefit has been in getting better processes, having a better framework to do our business, and having control of the tech measures we've put in place. It's been a lot of work, but we're getting bigger and stronger all the time, and that feels great."


Dan said that he would recommend a solution like GoldSky to any business that needs a fractional CSO — and that in many ways an outsourced option is more valuable than having a full-time CSO on staff.



“If we had someone on staff full time. we wouldn’t have nearly the amount of expertise that we do with Jonathan and the GoldSky team,” Dan said. “GoldSky has a number of experts whom we work with quite frequently on different things, and having that immense resource pool just makes sense.

“Plus, Jonathan has been through SOC audits at various levels, so knowing that we have someone working with us who knows exactly what to do and is holding that vision for us is awesome.”

Dan said that having the highest levels of cybersecurity and compliance has been critical for their business — and has provided him with peace of mind because he knows that true experts are taking care of it.



“As a small business, when the fish come by we have to catch them,” Dan said. “We’ve grown organically over the years and at times it’s been very quick growth, where we’re just doing what we need to do to meet business needs. Up until we began working with GoldSky, it hadn’t been realistic to put our security first.

“But now, we’re not worried about new technology, security, or compliance issues. We’re able to focus our efforts on strategizing the future.”

**Need an outsourced team
of cybersecurity experts to
help your company create a
more security-focused tech
environment and win bigger
clients and contracts?**



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