



Case Study

Envest Investments
Modern IT to merge and
acquire with ease.

Envest Investments entrusting Atarix with their ambitious goals. Modern IT to merge and acquire with ease.

The Challenge

Envest Investments is a private, entrepreneurial, equity investment business that focuses on the startup and Insurtech industry, supporting insurance and financial service businesses to achieve their growth objectives.

From the beginning Envest knew they needed a cloud model that could be flexible and scale with their ambitious goals.



The Atarix team have an exceptional talent pool that are dedicated and will always look to go above and beyond. They make sure that they take the time to understand our environment / business needs and recommend solutions that are fit for purpose and follow industry best practise. They have successfully assisted us with a number of consolidation projects and although there is sometimes the “unknown, unknown” factor, they work well under pressure and ensure that we are able to deliver on our commitments. We see Atarix as a part of our team and not an external MSP.

Sahil Tulsiani, CIO

They quickly realised that they needed an IT partner and team immediately (not just an provider) to achieve these goals. As their IT partner from day one, we had intimate understanding of their business and as the business matured, they wanted to take it to the next level, in providing IT for 11+ businesses.

The Solution

IT & Business Strategy

The aim was to align their business strategy with IT, continuing the growth of their business whilst de-risking. We sat down to understand their plan, providing them recommendations to achieve their target state of scalability, whilst maturing the technology and security of all smaller business they acquired. Being stronger together.

Modern Workplace & Teams Meeting Rooms

This is where we started, with the foundations. Partnering with us, we were able to provide Envest the technology, taking the management of IT off their hands with our Modern Workplace solution. It grew to us managing their network, as well as installing and managing their Teams Meeting Room experience. This allowed Envest the peace of mind and time to focus their efforts on business growth and strategy.

Cloud Migration

Envest has acquired 11 business to date and climbing, under the EDA, Aviso Broking and Aviso Select brands. Each of these businesses had separate Microsoft 365 tenancies, some with on-premise infrastructure and others hybrid. The challenge was to migrate and merge all these tenancies under the one tenancy, aligning timeframes in conjunction with other business transformation initiatives.

It started with the merge of five of their direct agency businesses. Engaging our expertise around Microsoft 365 and complex migration projects, we devised our plan:

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- › Designed information architecture to support the scaling out of Teams and SharePoint Online.
- › Migrate users from each of the existing tenancies into Envest.
- › Devise a detailed support matrix to define coverage of support.
- › Developed device management to support each business's apps and security requirements.
- › Adjusted the security to meet the new agency's security posture whilst enabling modern work use cases.

With the success of the initial five successful merges and migrations, Envest re-engaged us for the merging another six of their broking businesses which included migrating all users, mailboxes, SharePoint data, OneDrive and file servers. There were several other business initiatives concurrent to this one, so we had to work within tight timeframes, so everything was aligned.

As Envest Investments continue to grow, they will be looking to replicate this through each business they acquire moving forward.

Standardise Email Signatures

Merging 11+ businesses and their sights on merging more, a centrally managed email signature system was implemented allowing Envest to deploy each of their signatures specific to each brand, from one place. This brought immediate value:

- › Time saved in streamlining email signature process without each person setting up their own.

- › Consistency and uniformity in having the same, accurate signature across all devices no matter the client.
- › Streamlined collaboration with shared mailboxes - consistently applying the correct signature, automatically.
- › This has simplified what would have been a cumbersome task for all involved to maintain brand consistency and integrity.

Security & Phishing Awareness Training

Each business coming from different levels of IT maturity, it was important to standardised the level of security awareness throughout the organisation.

Deploying the right training to staff allowed the organisation to understand the overall awareness maturity, catering training to that particular level, and automating training sophistication on a per user basis.

The Value

M&A Experts

Seamless consolidation of entities, replicated and managed end-to-end.

Security

Not just with technology but also employees, mitigating financial, data and compliance risk.

Scalability & Flexibility

Standardisation and automation, enabling seamless and fast growth.

Cost Saving at Scale

Efficiencies with replicating migrations after each acquisition, realising savings in time and project costs.