

Optimized Insurance Planning

Secure, Scalable IT for a National Insurance Planning Network

INDUSTRY	Insurance · Financial Services
PROFILE	National network of experienced insurance planners supporting the financial services industry
ENGAGEMENT	Managed IT · Microsoft 365 Security · Compliance Support · Help Desk
STACK	Microsoft 365 · Entra ID · Intune · Managed Endpoints · Email Security · Backup

<p>National planner network supported</p>	<p>100% MFA enforced</p>	<p>Email + Endpoint security hardened</p>	<p>Compliance-ready documentation</p>
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The Challenge

Optimized Insurance Planning operates a national network of insurance planners who handle sensitive client financial information every day. The team needed an IT partner who could deliver consistent security, reliable email and collaboration, and compliance-ready documentation across a distributed workforce — without slowing producers down with heavyweight controls.

Our Approach

- Hardened the Microsoft 365 tenant with conditional access, enforced MFA, and modern authentication — closing the most common paths to account compromise in financial services.
- Layered advanced email security and anti-phishing on top of Exchange Online to address the social-engineering threats targeting the industry.
- Standardized endpoint management with Intune and managed antivirus, with backup and recovery for both endpoints and cloud data.
- Documented controls, policies, and recovery procedures in a format that supports carrier and industry compliance reviews.
- Provided a responsive U.S.-based help desk so planners always have a human to call when something gets in the way of serving a client.

Outcomes

- Strong, defensible security posture across identity, email, and endpoints — the controls that matter most in financial services.
- Producers spend their time with clients and carriers, not chasing IT tickets or password resets.
- Compliance and audit conversations are easier with documentation and evidence already in place.
- Predictable monthly IT spend with a single accountable partner for the full stack — identity, devices, email, backup, and support.

“BMIT gives us the security and reliability our industry demands, with the responsiveness our planners expect.”

— Optimized Insurance Planning Leadership

Read more: <https://optimizedins.com>