



CASE STUDY

ENSURING SUPPORT, FOR LIFE



THE CUSTOMER

GWG Life

INDUSTRY

Secondary Life Insurance & Finance

THE SOLUTIONS

Orange Book Infrastructure Assessment, 24x7 Network Monitoring & Management, The Atomic Cloud®

BENEFITS

- IT architecture designed to support current & future business needs
- Secure & highly available cloud environment
- Immediate, on-demand IT expertise
- A trusted IT partner

THE SITUATION

GWG Life is a Minneapolis based firm operating in the secondary life insurance market. When life insurance premiums get too high for insured seniors, GWG Life steps in with a solution that helps both GWG Life and the insured. GWG Life buys the policy and awards the beneficiaries of the deceased a significantly greater payout than would be awarded had the policy been surrendered to the issuing life insurance company or the coverage was allowed to lapse.

John Vilsack is the Chief Technology Officer at GWG Life, and he was hired in 2015 to leverage technology more effectively as their company grows. He saw that if GWG Life was going to continue to succeed, they needed a scalable technology infrastructure and a new, smarter approach to their systems to fully serve the needs of GWG Life employees.

“When I came here in September 2015, I identified an infrastructure that really needed a lot of attention. The internal infrastructure had been stood up fairly well, but it was legacy. It was a lot of the servers, the client server architecture that had been standard in the late 90’s early 2000’s wasn’t really taking advantage of a lot of the tools and technology that we are

now embracing with Atomic Data,” John recalled. Previously, GWG Life had been hosting and managing their CRM and other relationship management tools internally, with mixed success. To fix this, they moved to Salesforce®, but they had not changed their overall infrastructure strategy to match that ease of access and centralization. They were overdue for a new approach for their nationally spread-out sales team that emphasized simplicity and ease of access, while improving security.

In addition to these larger structural concerns, GWG Life had a legacy IT vendor who had been recently acquired by another out of state company and the level of service had subsequently declined. By the time John joined GWG, the vendor simply was not monitoring the network and providing resolution for GWG Life’s technology needs or helping to plan for the future, despite charging for those services.

“We are in the life settlement business, we are in finance, we are not an IT company, nor do I want to start building the infrastructure that facilitates the culture of being an IT company. This is an important distinction,” said Vilsack.

THE SOLUTION

John Vilsack remembers his first day at GWG Life, "On my first day, I clearly remember identifying several things that were amiss in my walkthrough. The legacy MSP acknowledged several of these issues during my introduction to them, but they clearly had not been reviewing logs, processing alerts, or monitoring the systems we were paying them for."

When Mr. Vilsack called for an explanation, the MSP excused the lack of inattentiveness on their own internal business changes and indicated that the GWG help desk should have notified them of these concerns; ignoring the fact that many of the issues were on devices they were solely responsible for maintaining.

Prior to Mr. Vilsack, GWG Life had not had a CTO in its history. So GWG Life was relying upon this legacy service provider to manage a lot of IT technology. John felt they just weren't getting the service that they needed, "They [the legacy IT provider] had

promised that they were going to be a virtual CIO to GWG Life. And if it meant not doing anything, then I guess they were doing great."

"Atomic Data is my entire scaling plan and I am 100% confident in their ability. I know that whatever I throw at Atomic Data, they will handle it."

– John Vilsack, Chief Technology Officer at GWG Life

So the new CTO decided to call Atomic Data, "Sure enough we got Atomic Data in here. One of the first things they suggested was a rapid Orange Book development to get the scope of what we were dealing with and then to excise this other contractor that had an agreement in place with a laundry list of things that they simply weren't doing."

The Orange Book found a number of issues...such as slow servers, a flat network design lacking different security levels, redundant systems and software, and inadequate disaster recovery solutions.

The Atomic Data Orange Book is a fact-finding and inventory-taking process of hardware, applications, and systems. An Orange Book determines what the essential pieces are, identifies the deficiencies that keep the infrastructure and employees from being more effective, and outlines a future-state plan to simplify budget planning. Using the results of the Orange Book, Atomic Data created an individualized solution for GWG Life that brought IT solutions into play that met their current business needs and accounted for future growth.



The Orange Book does not recommend one size fits all solutions for clients. Instead, Atomic Data's Architects work to understand the business needs of their clients to tailor solutions that fit.

The Orange Book found a number of issues that GWG faced in their IT environment such as slow servers, a flat network design lacking different security levels, redundant systems and software, and inadequate disaster recovery solutions. As a result of these discoveries, the top recommendation Atomic Data suggested was to migrate most of the GWG Life servers to the Atomic Cloud®. This would simplify their infrastructure, improve security, speed up performance, and make their business resources and

software more accessible to their remote employees all at once. The legacy servers and network equipment wouldn't need to be replaced with new equipment by GWG Life, instead they would just be migrated to Atomic Data's state-of-the-art cloud infrastructure.

The Atomic Cloud is Atomic Data's highly secure private cloud offering. It gives companies a rapidly scalable, geographically redundant, OpEx-focused infrastructure. It is also a more secure cloud option that is not targeted by malevolent entities in the way Microsoft Azure or Amazon Web Services are. This reduces the costs of owning your own infrastructure while improving security.

Atomic Data's assigned Architect put his recommendations into the Orange Book and a detailed implementation project plan was drawn up by an Atomic Data Account Manager. Detailed tasks were then constructed for each step along the way. Atomic Data's Engineers then executed the thorough migration plan. The twelve legacy servers were consolidated down to seven high performance cloud servers, and a high-speed fiber connection was built out to Atomic Data's Downtown Minneapolis data center from GWG's main office. For John, the migration to the



Atomic Cloud helped GWG Life simplify their network while also making it more transparent to their end users. Now all GWG Life's infrastructure and servers are behind Atomic Data's Cisco Next Generation Firewalls in their data centers, which offers improved security. These servers were directly tied into the domain using ADFS and the offices of GWG Life to ensure it was seamless.

As for the monitoring that the legacy vendor was failing to do, Atomic Data addressed this area by introducing Kaseya® Virtual Systems Administrator (VSA)™ as part of the Server Management solution. Kaseya VSA enables IT staff to monitor, patch, and control servers and workstations with a holistic approach. It also ensures all systems have the latest anti-virus definitions and system patches vetted by Atomic Data's Engineers.

Vilsack found the implementation of Kaseya useful and effective, "Kaseya makes sure that, when an issue crops up, that we can pinpoint and remote into systems quickly to address and rectify

the situation. This patching and monitoring software is a huge portion of how we address security." The other way that Atomic Data addressed the shortfalls of the previous IT vendor was to leverage their network architecture expertise to help GWG Life improve access and security through simplicity and transparency. "Finding simplicity is very important for GWG. A lot of the network here is fairly complicated.

One of the senior architects at Atomic Data is helping us de-obfuscate the network. We are doing that in a way that has little negative impact on the day-to-day operations of the company." This de-obfuscation of the network has also contributed to big gains in security for GWG Life. In the finance industry, companies walk a tight rope of accessibility and security. If the money can't be moved quickly when seniors and their families need it, then it's not accessible, but at the same time, that money has to be safeguarded.

"Trust and security is a very big deal for us. We needed to deal



more effectively with our data and build out secure, accessible data warehouses in The Atomic Cloud. This enabled us to pull information down from Salesforce, report against it, and have our business analysts be able to write direct SQL queries against it." In the life insurance market, there are many different types of sensitive documents such as medical records and financial information.

The compliance regulations for the secondary life insurance market and their somewhat vulnerable market demographic are extensive, but necessary. Atomic Data has helped navigate those waters. Atomic Data's SOC 3® certified, SOC 2® Type II attested compliance in their data centers and their cloud ensures a high standard is adhered to for information security.

Lastly, Atomic Data brought their white glove service and in-depth subject matter expertise to work for GWG Life. "GWGs internal IT team augments the staff that is conducting the business of life settlement and finance. I don't need to have

experts for Exchange or DNS in my employ. I can get on the phone with an Atomic Data Technician and be escalated to a subject matter expert who lives, breaths sleeps, eats whatever particular technology that we have to address. If an Atomic Data Systems Architect says, 'I think we should do it X way.' I think well, he's an expert on this, we should probably listen to his breadth of knowledge," Vilsack says.

"This SOC 2 is supporting the largest part of my infrastructure and with that, I sleep better at night."

– John Vilsack, Chief Technology Officer at GWG Life

GWG and John value that frank direct approach to problem solving. The partnership between GWG Life and Atomic Data thrives on keeping the lines of communication open, and facilitating accountability and transparency.



THE RESULTS

Since GWG called Atomic Data, they have been happy with the role and direction of technology to help expand their business, empower their employees' productivity, and keep data and infrastructure secure but navigable in the Atomic Cloud.

These tools and services allow John to act as CTO and steer the ship for technology at GWG Life instead of constantly reacting to each technical issue.

John knows that what he gets from Atomic Data saves him time and money. The white glove services and subject matter expertise Atomic Data provides allows GWG Life to focus on helping seniors and investing. "There's almost no price tag for that service and reliability that Atomic Data offers. There's a shadow army of Atomic Data behind the small internal tech team that we have. Some people are Mac people, some people are Google people. I am an Atomic Data guy."



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