




IT & Cybersecurity Services for Financial Services Company

PROJECT DETAILS

 IT Managed Services, Cybersecurity

 Jan. 2025 - Dec. 2025

 Confidential

 *"Veracity Technologies' flexibility was impressive."*

PROJECT SUMMARY

Veracity Technologies provided IT and cybersecurity for a financial services company. The team provided technical support and implemented Microsoft 365 Business Premium and Microsoft Intune.

PROJECT FEEDBACK

Veracity Technologies deployed Microsoft 365 Business Premium, integrated Azure AD, and enforced security policies. The team consistently met targets, communicated effectively, and provided detailed reports. Veracity Technologies' flexibility and proactive problem-solving approach were unique.



The Client

Introduce your business and what you do there.

I'm the COO of Black Lake Investments, a financial services company. Our experienced team partners with institutional investors to source and manage mortgage assets.

The Challenge

What specific goals or objectives did you hire Veracity Technologies to accomplish for your financial services operations?

We hired Veracity Technologies to enhance our IT infrastructure, improve cybersecurity measures, and provide ongoing technical support to ensure smooth operations and minimize downtime.



Ellen Qureshi
COO, Black Lake Investments



Financial services



Wayzata, Minnesota

CLIENT RATING

5.0

Overall Score

Quality: 5.0

Schedule: 5.0

Cost: 5.0

Would Refer: 5.0



The Approach

What was the scope of their involvement?

Veracity Technologies delivered professional services, including solution architecture, project management, and technical implementation for Microsoft 365 Business Premium. Key phases included acquiring upgrade licensing and configuring advanced threat protection, followed by the initial setup of Microsoft Intune as the MDM authority with role-based access control and delegated administration. Azure AD integration ensured proper configuration, automatic device enrollment, and conditional access policies.

Device enrollment preparation covered platform restrictions, Apple MDM certificates, Android Enterprise, Samsung Knox, and Windows Autopilot profiles. Compliance and configuration policies were established for all platforms, including security baselines and connectivity profiles. App management involved deploying Microsoft 365 and other apps, applying app protection and configuration policies. Conditional access policies were implemented and tested with Microsoft Defender integration.

Full deployment included organization-wide enrollment and compliance monitoring, supported by updated documentation and provisioning forms. Ongoing management focused on policy reviews, Intune dashboard monitoring, and device lifecycle planning.

What is the team composition?

We worked with 2–5 teammates from Veracity Technologies.

How did you come to work with Veracity Technologies?

We found them through an online search. We chose them over other options because they had high ratings, were close to our geographic location, had pricing that fit our budget, had a great





culture fit, offered good value for cost, and had company values aligned with ours.

What is the status of this engagement?

We worked together from January–December 2025.

The Outcome

What evidence can you share that demonstrates the impact of the engagement?

The measurable outcomes included the successful deployment of Microsoft 365 Business Premium across the organization, full integration of Azure AD with automated device enrollment, and implementation of conditional access policies verified through Microsoft Defender. All targeted devices were enrolled and compliant with established security baselines and configuration policies. App protection and management policies were applied consistently across platforms, and Intune dashboard monitoring confirmed that compliance standards were met. Updated documentation and provisioning forms streamlined onboarding and ongoing device lifecycle management.

We really appreciated the Huntress Reporting that we received each month that demonstrated how many threats we successfully thwarted by employing Veracity Technologies' endpoint management service.

How did Veracity Technologies perform from a project management standpoint?

Veracity Technologies' project management was transparent, and they always met their implementation targets. We communicated via in-person meetings, virtual meetings, and email or messaging apps.





What did you find most impressive or unique about them?

Veracity Technologies' flexibility was impressive. They understood that we were a unique small business and accommodated our needs perfectly.

Are there any areas they could improve?

No, they were able to look around corners and anticipate roadblocks.

