



SaaS-Based Legacy & Estate Management Provider

Case Study: SAAS provider finds the secure solution for critical customer data

“We chose PetaForce to prepare our people, processes and technologies for multiple compliance needs. PetaForce’s ability to align our systems to our proven business processes was key to our business as we scale our service to larger and more diverse distribution channels.”

case study

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SAAS provider chooses PetaForce to securely manage the delivery of sensitive customer data

PetaForce Services: Compliance Readiness, Data Security Consulting, ITIL Best Practices, Process Improvement, Organizational Change Management

Scenario:

Founded in 2005, this Estate Management service provider creates a family of software solutions to help individuals and their executors successfully manage the transfer of personal wealth and legacies to heirs and beneficiaries. The Estate Management company develops a number of solutions for the estate settlement market where the management and distribution of very sensitive data is key. As the company increased the development and distribution of these services, it was imperative that these solutions were seen by both distributors as well as the public to be completely reliable and secure.

Business Challenge:

The Estate Management company was in a traditional phase from handling a relatively small number of orders for its online estate planning software to the on-boarding of large subscriber influx via several different channels. This was posing a massive scaling challenge in their ability to handle the different channel delivery models. Furthermore, since the company’s software service deals with personal confidential information of its subscribers it is essential that their data security receive the highest priority. The privacy policy and data security requirements for solutions in the estate settlement market are paramount to the success of their business, on-par with those found in both the financial services and insurance industries. As such, skills in building a scalable and multi-compliant business solution were needed, who also had the extensive experience and depth in data security and governing processes.

Solution:

PetaForce worked hand-in-hand with the company’s executive management to define and implement the best practices of PCI-DSS, SOX, HIPAA and various ISO standards. Through PetaForce’s Compliance Readiness efforts Executor’s Resource improved their processes for customer data management, change management and IT Operations. This allows the Estate Management company to align its resources more readily to the new demands of its compliant partners and deliver their valuable solutions to customers, who benefit from the peace of mind their data is both secure and readily accessible.

To learn about how PetaForce can help your business find solutions, visit our website at www.petaforce.com. You can also call a PetaForce representative today at 720-771-4478 or email us at info@petaforce.com