



## ABOUT CGAM

CGAM is an independent investment manager that serves institutional and professional clients. Founded in 2000 in the City of London, it is majority owned by an employee ownership trust run for the benefit of the employees, all of whom personally invest in the funds that CGAM advises.

# CGAM adopts Finance Forward 365 and demonstrates how investment managers are securely embracing the Microsoft Cloud

## THE CHALLENGE

CGAM's team focuses on the performance of a small range of relevant and differentiated funds. Managing operational risk to support its core business is paramount and technology plays a key role as it responds to the evolving financial needs of the investor communities it serves. CGAM needs IT systems that are robust, secure and fit for purpose and that's why six years ago it made the decision to partner with financial services specialist Lanware to deploy its private cloud Service.

But with its private cloud platform nearing end of life and increasing public cloud adoption across financial services, now was the perfect time to upgrade and transform the investment boutique's technology. The latest Office tools, security and remote working capability in the Microsoft Cloud would give CGAM the foundations for a highly secure and collaborative environment.

Chris Taylor, COO, CGAM explains, *"Business continuity is a very important part of our business and I was aware of a number of large firms already using the public cloud for all their IT. Moving away from thin client devices to laptops and Microsoft's modern workplace technology would mean our staff could still work from anywhere without any reduction in service and without compromising the level of security that our clients and the regulators expect."*

## HIGHLIGHTS

- Finance Forward 365 ensures business continuity of services during Covid 19.
- Microsoft Teams helps staff collaborate effectively and securely, increasing productivity.
- Best-in-class security tools mitigate cyber risk threats and meet regulatory requirements.
- Rigorous compliance demonstrated to clients with the deployment of Finance Forward 365.
- 24/7 managed service including desk support, disaster recovery and cyber security.

## THE SOLUTION

In late 2019 prior to COVID-19, CGAM moved from the private cloud to Lanware's Finance Forward 365, fully based on Microsoft 365 & Azure.

Chris explains *"One of the benefits of moving to Finance Forward 365 with Lanware is that as a smaller firm we're benefiting from all the best-in-class tools that the larger players have access to, but at an accessible cost."*

The introduction of Microsoft Teams is making a huge difference in personal productivity for the team as they incorporate Finance Forward 365 collaborative solutions into their daily work and achieve better outcomes. It is dramatically reducing the amount of email traffic as staff collaborate internally and externally with Teams chat and get faster access to information from service providers, for example for fund price data.

All the latest productivity and collaboration tools help ensure the continuity of CGAM's investment management services during Covid-19. With Finance Forward 365 the team has continued to work seamlessly from home with full access to all systems

including integration with the remote working capabilities of the firm's significant service providers to their funds. Files and documents are automatically saved using OneDrive, whether online or offline, and easily shared and co-edited with colleagues on SharePoint.

CGAM trust they can securely access the information they require, wherever they are. Chris adds, *"Because Finance Forward 365 includes Intune, we can also easily manage the security of our mobile devices."*

The Lanware Cyber team continually monitor all the security controls and threat landscape around the clock. All security events are aggregated into Lanware's Security Incident Event Management (SIEM) system, trend analysis is conducted, and indicators of compromise acted upon. In the event there is a security breach, cyber incident recovery processes are in place to recover and respond.

The public cloud infrastructure hosts CGAM's business-critical applications and provides seamless integration for its tools including Bloomberg via biometric keyboard

technology. As Finance Forward 365 is a managed service, Lanware proactively handles all software and application updates, procurement and certification management so CGAM can focus on its core business.

The Lanware Service Desk acts as their IT department, following service best practice to deliver consistent service excellence. New end use hardware such as laptops can be provided quickly through the Service Desk which provides fast and proactive high-touch support.

Chris says, *"With Finance Forward 365, our team is empowered with more powerful tools to find and secure information and improve our financial services delivery. We're confident that we're compliant in the event of an audit and trust Lanware to mitigate against cyber risks."*

Richard Goody, CGAM Chief Risk Officer agrees, *"Any technology that allows us to collaborate and communicate better is critical to making us efficient and helping us to improve client experience. Everything's in one place now and easily accessible for remote working."*

## KEY BENEFITS

**Compliance and risk management:** CGAM has the confidence that they are compliant in the event of an audit, due diligence requirement or cyber security incident.

**Business continuity planning:** Finance Forward 365 provides the resiliency and options to plan for every eventuality.

**Enhanced personal productivity:** The team works better together on files and documents effectively and efficiently wherever they are, without any reduction in quality of service or compromise in the security levels that CGAM's clients and regulators expect

**Best-in-class security:** The boutique asset manager has the best-in-class security tools, security operation and customisation capability that is normally only available to larger organisations.

**Disaster Recovery:** Each staff member has two laptops managed by Lanware and are not dependent on location, so the business can securely set up anywhere at any time.

**Day-to-day managed IT service:** Lanware's service covers everything from everyday help desk support, to disaster recovery, cyber security and infrastructure maintenance.



## WORKING WITH LANWARE



*Having a technology partner that is exclusively focused on finance services and cyber security is important to us. With Finance Forward 365 we can demonstrate to our clients and service providers the due diligence we perform and the rigorous compliance in the technology that we deploy,"* explains Richard.

*"Our business approach is to keep things simple. IT is a complex area but we're keeping it simple and as standardised as possible by employing a financial services specialist partner that focuses on technology as their core business - so we can focus on our core business."*

*"The Lanware Service Desk is brilliant, really proactive and tuned in. If they don't know the answer to our queries instantly, they very quickly come back to us. We depend on them for nearly everything IT-related; there's very little we fix ourselves."*

Chris Taylor, COO, CGAM