

# Future-proofing financial services

## Client

**Security National Financial Corporation** operates three primary business segments: life insurance, mortgage lending, and funeral services. Founded in Salt Lake City in 1965, Security National continues to expand its presence across business lines nationwide, with more than 1,700 employees in 150 branch offices across the country.

## Fast Facts

Since 1965, Security National Financial Corporation has steadily expanded its footprint across the U.S. through a series of acquisitions and new branch openings. As the company's growth accelerated over the past decade, Security National realized that its enterprise IT infrastructure was not built to support sustainable growth. The company called on the technical experts at Dynamic Network Advisors for help navigating their ongoing expansion with flexible, secure IT solutions.

Challenge	Solution	Results
After five decades of growth, Security National faced the challenge of providing cost-effective data connectivity and voice services to 150 offices across the country.	Dynamic helped Security National migrate its voice and data services to the cloud, enabling the streamlined infrastructure that the company needed to sustain its growth.	Through ongoing guidance and constant contact, Dynamic helps Security National explore emerging technologies to support the organization's continued expansion.
Email services and other IT solutions were previously hosted on-premises, which became increasingly burdensome to manage as the company continued to grow.	Dynamic introduced a trusted service provider to guide Security National's migration to Office 365, providing both the functionality and the knowledge to effectively leverage cloud-based solutions.	By connecting Security National with specialized technical experts to deliver specific solutions, Dynamic cemented itself as a trusted growth partner.
Since insurance and lending businesses generate multitudes of sensitive customer information, Security National needed to safeguard the privacy of its data without straining its limited internal IT resources.	To complement Security National's limited internal staff, Dynamic connected the company with the cybersecurity expertise of a virtual CISO.	Leveraging vCISO-as-a-Service gives Security National the benefits of a robust, mature security program without having to invest in dedicated internal resources.

## Challenge

As Security National grew from a few dozen offices to 150 locations within the past ten years, the company had to quickly unify branches that were scattered all over the country. Voice, data, and email services were traditionally housed on-premises, which made it difficult to cost-effectively connect new offices. With its limited IT staff focused on day-to-day operations, Security National needed additional support to keep data flowing smoothly and safely as the company continued to grow.

## Solution

To unify Security National's disjointed branch network, Dynamic helped the company migrate its voice and data services to streamline operations on the cloud. Dynamic also brought in a trusted partner to guide Security National's migration to Office 365—facilitating a smooth rollout that allows all 1,700 Security National employees to access critical business applications from any location, on any device.

Additionally, to safeguard the privacy of sensitive customer data, Dynamic introduced a third-party cybersecurity partner to serve as Security National's virtual chief information security officer (vCISO).

"We do not have a CISO on staff, so having a virtual CISO complements our small internal security department and brings a depth and breadth of mature security practices that have helped us in our growth," comments Security National's Vice President and Chief Information Officer. "Security is critical as we onboard new offices, so we're leaning on Dynamic to navigate that without having to invest in expensive security resources."

## Results

Not only did Dynamic help enable the network infrastructure and software functionality that Security National needed to sustain its growth, but they also introduced other service providers with the technical expertise to address specific business needs. This collaborative approach cements Dynamic as a trusted partner and guide throughout every phase of Security National's expansion.

"We rely on Dynamic as our partner to bring new ideas to the table and help us explore emerging technologies," Security National's Vice President and Chief Information officer adds. "They approach us more as a partner rather than a vendor trying to sell a product. They give us the space to make informed decisions and then help us navigate the water to get where we want to go. It's been a great relationship, and it has certainly facilitated our growth."

**Contact Dynamic** to support your business growth with cost-effective IT guidance.