

True North Advisors

A respected, independent wealth management firm, True North Advisors is founded upon the principle of stewardship – the careful and responsible management of your financial assets to reach your goals now and in the future. Founded in 2000, True North Advisors is based in Dallas Fort Worth, Texas and services high net worth individuals and institutions. Unlike other wealth management firms, they do not sell products, so their advice is provided to clients through a firm with complete independence, objectivity and the absence of conflict of interest.

Opportunity: Provide employees easy-to-use anywhere access

Employees at True North Advisors spend a lot of time visiting clients and consulting out of the office. In order to ensure they had all of the documents they may need close by, they took paper copies and their laptops with them. They wanted easy access from their iPads to the latest version of their files, at all times.



“After looking at Box, Dropbox, Sharefile and Egnyte HybridCloud, we realized that Egnyte was the right solution for our needs. We were able to deploy quickly, giving different levels and types of access to different people ranging from clients to employees.”
-Taylor Herzog, Technology Solutions Manager

Challenge: Maintain security and compliance

Recognizing the need to find a cloud solution that fit the needs of all employees, Taylor Herzog, the Technology Solutions Manager, set out to find a cloud solution. Taylor needed a solution that met industry security regulations and compliance. He wanted the benefit of the cloud coupled with fast local access and enterprise grade security.

Taylor found Egnyte on the Kleiner Perkins website and the hybrid cloud solution intrigued him. He decided to test it out, along with Box, Dropbox, Sugar sync and Sharefile. He found that while the other solutions provided the benefits of the cloud, only Egnyte offered the hybrid solution and a high level of security. He tested Egnyte’s Personal Local Cloud solution for a few months and decided that Egnyte would provide a seamless experience for employees.

“Egnyte holistically solved all of our problems, but did not compromise the employee and client experience,” said Taylor.

Solution: Office Local Cloud deployed on a NAS

Taylor chose to deploy Office Local Cloud on an existing Netgear NAS device. Employees access their files via mapping a drive to the Office Local Cloud. The mapped drive feature provides a solution that employees of all technology levels can easily understand. The hybrid solution provides secure, fast local access.

“We were able to deploy quickly, giving different levels and types of access to different people ranging from clients to employees, regardless of where they were accessing their files from, or whether they used a phone, tablet or laptop,” said Taylor. “Further, the hybrid cloud approach means we always have access to our client data residing on a NAS device behind our firewall, giving us and our clients an extra level of comfort with the same level of high speed local access we had grown accustomed to. Users did not have to compromise on the experience they were accustomed to; instead we simply made it better.”

Granular permissions and security are also key benefits. The compliance officer liked Egnyte’s security and compliance, saying it was top notch. Taylor liked the granular permissions because it provides one platform that can be configured for internal users, clients and vendors. Egnyte’s permissions enable him to create unique experiences for each type of user. Additionally, Egnyte’s branding capabilities enabled them to customize their cloud file server, providing clients a familiar interface.

Egnyte’s Outlook Plug-In is a favorite feature for employees. Before Egnyte, employees consistently sent attachments back and forth, which was a bad security practice. With Egnyte’s Outlook Plug In, employees can easily create a link to a file directly from Outlook.

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“Egnyte adoption was seamless for employees. The ability to access files in a familiar Windows Explorer via mapped drive and to easily share links via Outlook enabled them to get up and running with Egnyte immediately.”

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TAKE THE NEXT STEP

Over 1 Billion files are shared daily by businesses using Egnyte. Egnyte provides the speed and security of local storage with the accessibility of the cloud. Users can easily store, share, access and backup files, while IT has the centralized administration and control to enforce business policies. Egnyte, founded in 2007, is based in Mountain View, California and is a privately held company backed by venture capital firms Google Ventures, Kleiner Perkins Caufield & Byers, Floodgate Fund, and Polaris Venture Partners. For more information, please visit www.egnyte.com or call 1-877-7EGNYTE.