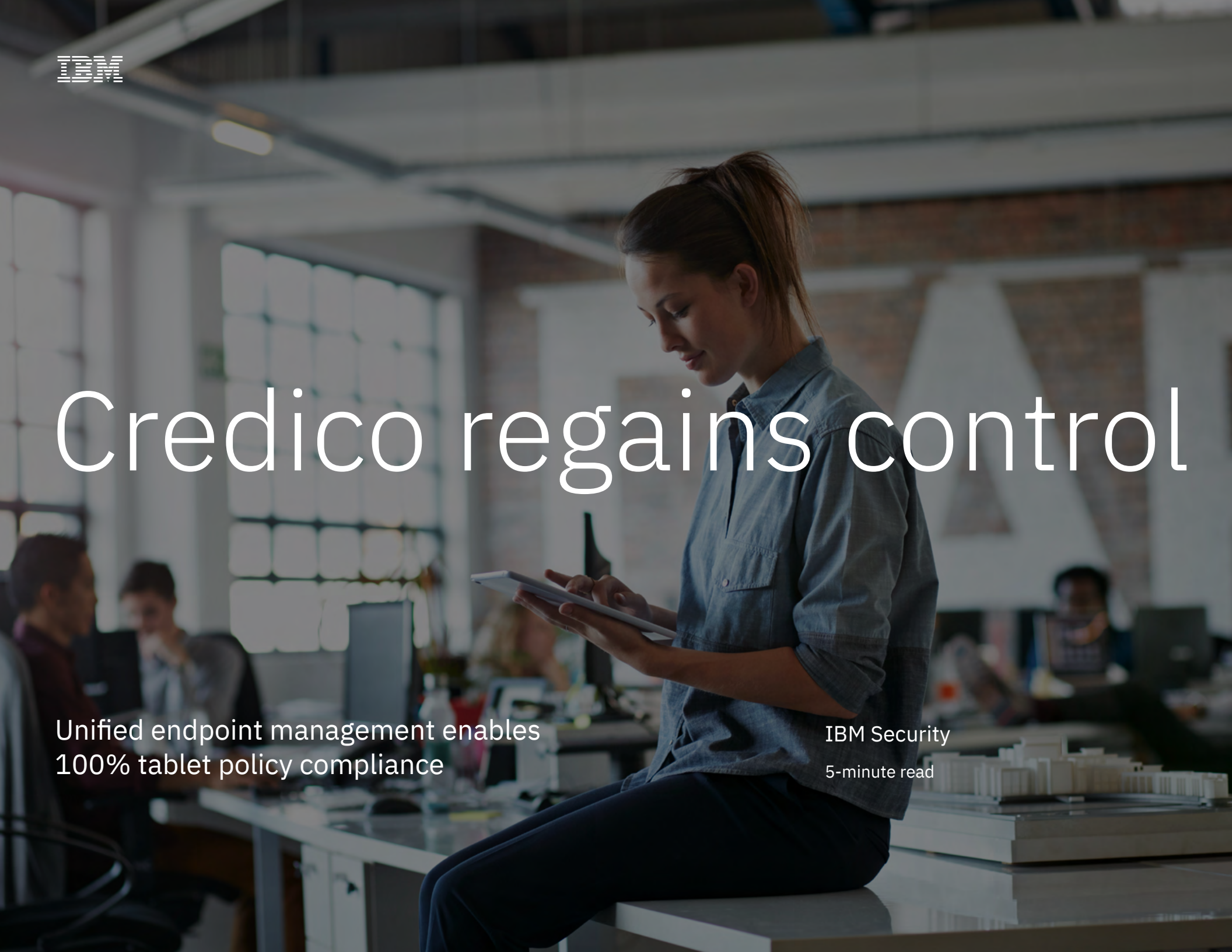

Credico regains control

Unified endpoint management enables 100% tablet policy compliance

IBM Security

5-minute read

How does an organization manage 2,000 - 3,000 tablets for a diverse set of independent sales offices (ISOs) spread out across the US, Canada and beyond? It's not easy. But that's just what Credico is doing.

The company outsources direct sales and marketing campaigns primarily for large organizations—including numerous major communications companies—that are looking to branch out into new markets. Credico relies on a network of more than 200 ISOs to provide direct sales services on behalf of its clients' campaigns. Each ISO is separately owned and operated, and employs approximately 10 – 50 sales agents.

Starting in 2013, Credico began exclusively making available, servicing and securing tablets for its ISOs to use in marketing and selling. The company managed the tablets using a mobile device management (MDM) solution to facilitate security and install campaign-specific apps and data. Enforcing complete compliance with internal policies for tablet usage was a significant part of its agreement with clients.

In 2017, however, the company's MDM was falling short of these expectations. Participation was low, with only 40% – 60% of tablets enrolled and compliant at a given time. What's more, the MDM provided limited to no reporting or insight into the state of the tablets in the field. "When we needed to push a new version of an app, we didn't know how many people got the app or when they got it—it was a messy, time-intensive process," says Jon Bromling, Chief Technology Officer of Credico.

In fact, the MDM was unable to interact with the ISO owners at all. It couldn't notify them of data overage or tablet policy compliance issues or enable them to locate or wipe their own devices. The lack of visibility and interaction proved costly. "A huge challenge was data usage on tablets," says Bromling. "People would jailbreak them out of the MDM and then use them to stream video and run up massive data charges—upwards of USD 70,000 a month."

This issue caused another level of pain for the company. "We had an agreement in place that if an ISO went over its limit, the ISO would get billed for those overages," says Bromling. "While we could pass that cost down to them, that was hurting them—and it was punitive instead of proactive."

Reliability was also a problem. MDM outages could last for days, leaving Credico with no control of the system or ability to push updates without taking devices out of compliance—and risking never getting them back in. Even when the MDM was functioning, everyday processes were cumbersome, required specialized knowledge and took hours to execute. Credico found that the lack of reporting and insights meant that a lot of time was spent manipulating the data outside of the system to determine what actions to take. All of these factors reduced reliability and responsiveness to the needs of the ISOs.

Credico needed an MDM that could help it achieve full compliance with internal tablet policies, provide self-service support capabilities to the field and enable ongoing two-way communication with the ISOs.

"The problem was the constant churn of devices and management of change that forced devices constantly out of compliance—it was like we were playing catch-up all the time."

Jon Bromling, Chief Technology Officer, Credico (USA) LLC

UEM policies increased compliance to

100%

up from 50% with the previous MDM solution

Reduced monthly data charges by

64%

from USD 70,000 to USD 25,000

A robust UEM solution from a trusted partner

When its MDM contract came up for renewal, Credico decided to shop around for something more advanced. The company chose the IBM Security® MaaS360® with Watson® solution over several other options. The cloud-based, AI-infused unified endpoint management (UEM) solution provides capabilities that enable organizations to manage and secure disparate endpoints, including tablets, in addition to their associated apps, content and data.

Two factors played most strongly in Credico's decision. "I needed to have a name that I trusted and that our clients would inherently trust," says Bromling.

"And so, for me, the IBM name and the MaaS360 feature set put it near the top of the list, because we had a very specific set of requirements written into the contract language. So number one was matching those requirements to ensure compliance with our client commitments."

Key among those features were the AI reporting capabilities delivered by the MaaS360 Advisor component. These capabilities provide a holistic view of security vulnerabilities, opportunities for improvement and information related to out-of-compliance devices.

IBM Watson® technology applies unique AI-powered capabilities to scour structured and unstructured data sources, proactively identifying security exposures that could potentially impact Credico's environment. This information allows the company's security team to focus more on resolving security issues and less on researching and identifying security risks.

The MaaS360 Advisor component uses Watson technology to deliver contextually relevant insights to Credico about its devices, apps and associated data—providing recommendations for corrective actions and policy adjustments. And the MaaS360 Mobile Expense Management module tracks data usage and notifies ISOs when they're approaching their data limits.

Credico conducted months of testing on a handful of tablets prior to formally rolling out the MaaS360 UEM solution to all of its tablets over a six-week period in June and July of 2018. The IBM team supported the implementation every step of the way and continues to work with Credico on improvements, such as integrating pertinent third-party products with the system.

"We received amazing support from the IBM team during the migration," says Bromling, "because we were evaluating different ways to configure the system to do what we wanted it to do, and each way, you make some sacrifices and have some wins."

Compliance management, cost savings and stellar service

Since implementing the MaaS360 UEM solution, Credico's compliance with internal tablet policies has skyrocketed from 40% – 60% to as much as 100%, due in large part to the solution's reporting capabilities. The compliance level also greatly benefits from the improved convenience and efficiency provided by the application features and design.

"We report weekly to see which tablets are not being used and which are unenrolled, and we take corrective actions by suspending those lines," says Bromling. "The ability to do that has corrected the behaviors that

caused the compliance problem to begin with." If an ISO urgently needs a new or updated app between reporting periods, Credico can put it in the MaaS360 app catalog for agents to access and deploy immediately.

Data charges also have dropped dramatically—from USD 70,000 to USD 25,000 per month—due to the MaaS360 solution's ability to track and report out-of-compliance tablets. "We use the powerful reporting and export features of the MaaS360 solution to cross-reference data usage with our cellular bills," says Bromling. "MaaS360 is able to provide the phone number for specific devices, which we can use to cross-reference them."

This has helped Credico ensure data is used within allowances with great precision, even if the SIM card is removed from the device and used elsewhere. Regardless of what happens with a device, the company can quickly take action to prevent misuse.

The ISOs are also empowered with greater control over their devices. "The self-service functionality of MaaS360 by way of the end-user portal has enabled ISO owners to access their devices in unprecedented ways," says Andre Sorrel, IT Security Analyst at Credico. "Owners can now locate, remotely wipe and lock lost or stolen devices, as well as reset the passcode of a device an agent may have unintentionally changed in the field."

Watson technology's AI capabilities elevate the MaaS360 solution to a point beyond comparison to Credico's previous MDM. "The information coming in through the MaaS360 Advisor is very valuable," says Bromling. "While we could get the information using other reporting capabilities and news services, we'd never be able to do it due to the small size of our team."

"It saves us so much time that I would say it would never happen if Watson weren't feeding it to us," he continues. "If we were trying to accomplish *then* what we're doing *now*—even if it were possible—we would probably need another full-time employee, if not two."

"My Advisor—through its constant analysis of our environment—not only lets us know how many devices lack the latest patches but also gives us a breakdown of the fixes included in the patches, as well as applications that are missing security-related fixes."

Andre Sorrell, IT Security Analyst, Credico (USA) LLC

About Credico (USA) LLC

Credico (external link) specializes in linking outsourced independently owned direct marketing and sales teams to companies that want to acquire customers in new markets. Headquartered in the US in Chicago, Illinois, the company has more than 75 employees and partners with 200 ISOs in the US. Credico's affiliates also operate in Canada, the UK and South Africa. These ISOs employ a total of 2,000 – 3,000 sales agents.

Solution component

- IBM Security® MaaS360® with Watson®