

## CUNA Mutual Group

### *Protecting customer privacy and securing corporate data with CREDANT Mobile Guardian*

#### Solution Profile

URL: [www.cunamutual.com](http://www.cunamutual.com)

**Industry:** Financial Services

**Headquarters:** Madison, WI

**Business Profile:** The CUNA Mutual Group is a leading provider of financial services to credit unions and their members worldwide, offering lending, protection, financial, employee and member solutions through strategic partnerships, technological innovations and multiple service channels.

Pioneers of the credit union movement established the CUNA Mutual Insurance Society in 1935. CUNA Mutual Insurance Society is the parent organization of all the companies that together form CUNA Mutual Group.

The CUNA Mutual Group employs nearly 6,000 people and has offices in Madison, WI, Waverly, IA, and Rancho Cucamonga, CA. It also has six Regional Marketing Offices throughout the country.

**Solution:** CREDANT Mobile Guardian Enterprise Edition

#### **Applications Supported:**

Mobile desktop with connectivity to email, calendaring and other CUNA financial services applications that support credit unions and their members.

#### **Operating Platform:**

Microsoft Windows

**Implementation:** Pilot with phased roll-out to 2,500 notebook PCs. Future deployment includes PDAs and smartphones.

The confidence and trust credit unions have in CUNA Mutual is reflected in the fact that it protects, with one or more coverages, nearly 95 percent of the 9,500+ credit unions in the United States. In addition to achieving positive financial results, CUNA Mutual believes it is essential to provide, on a competitive basis, the services that will contribute to the success and security of credit unions and the members they serve.

CUNA Mutual has field representatives who work with credit unions and their members. Because these staffers are mobile, traditional desktops did not work for them. Notebook PCs have become the norm for about 1,200 of CUNA Mutual's field staff. A virtual desktop and an Internet connection ensures the field team has access to email and back-end financial services applications needed to support their customers while in the field. Benefits of mobility include improved productivity that translated into more time spent with the customers and members.

Founded in 1935, CUNA Mutual has changed with the times, but one factor remains constant — the protection of credit union members' data. CUNA Mutual understood the need, and took steps to focus its security strategy on protecting credit unions' and their members' data, especially on notebook PCs that are highly vulnerable to loss and theft. Recent privacy legislation only reinforced what CUNA Mutual already knew, that credit unions and members viewed privacy as an important issue.

#### **The Business Problem**

The hardware cost to replace a lost or stolen notebook is insignificant relative to the cost of non-compliance and brand damage caused by the malicious use of inadequately protected data contained on the notebook. With sensitive credit union and member data and company confidential data to protect, CUNA Mutual needed an enterprise-strength encryption solution that would augment password protection by protecting data stored on the notebook PCs. The company also wanted their encryption solution for the Windows-based notebook PCs to be easily managed and available on other platforms including PDAs and smartphones for future mobile initiatives.

## The Challenges

One of CUNA Mutual's challenges was to balance strong encryption that met regulatory compliance without impacting the productivity of its field representatives. Field representatives rarely go into their office and rely solely on their notebook PCs to do their jobs. When a notebook PC fails and information is unavailable, productivity declines abruptly costing valuable time and dollars. In addition, the solution had to be easy to administer and manage.

## The Process

Each day that went by without taking action to encrypt data on notebook PCs placed CUNA Mutual one day more at risk. The company created a team, formalized the plan and started the investigation of different approaches to encrypting the data. Both file-and-folder and full-disk encryption products were considered. The selection of a solution was based on a formal Request for Proposal (RFP) process that entailed written responses, demonstrations, and an extensive in-house evaluation of the finalists' products. Reference calls were also made to substantiate vendor claims.

## The Solution

FIPS 140-2 validated, CREDANT Mobile Guardian was selected as the encryption product of choice based on its ability to meet regulatory compliance, ease of administration and deployment, and minimal user impact. CUNA Mutual understood the obstacles that needed to be overcome with both file-and-folder and full-disk encryption solutions and worked with CREDANT to develop a new class of encryption that was intelligent about what to encrypt and when, while ensuring that certain types of documents were secured no matter where they were stored.

The selection was more than a technical decision. CREDANT Technologies' vision, direction and support, coupled with its relationships with companies such as Intel and Microsoft were also key factors in the decision process.

## Next Steps

CUNA Mutual has completed integration of CREDANT Mobile Guardian to its Active Directory, finalized its deployment plan, completed an end-user pilot, and is nearly finished with their field deployment. The company plans to deploy the software on its home office laptops within the next few months. Although CUNA Mutual does not see handheld devices replacing notebook PCs, it does see them potentially replacing cell phones in the future, and is considering rolling out the CREDANT Mobile Guardian solution on platforms such as PDAs and smartphones in order to safely mobilize employees in all areas of the business.

"We chose CREDANT Mobile Guardian to mitigate risk by controlling encryption of sensitive data – not simply having a switch to turn it on and off. When you encrypt anything like the operating system that interfaces with the hardware any corruption can do serious damage to the notebook PC. The CREDANT solution does not encrypt the operating system or program files, yet ensures that data is encrypted no matter where it is stored."  
Bill Jubeck, Technical Delivery & Infrastructure Services, CUNA Mutual