

Global Asset Management Firm Gains SaaS Visibility and Passes Audit with Perfect Score

APPOMNI'S IMPACT



Instant compliance with regulatory and internal security standards



Full visibility into SaaS configurations and admin activity



Continuous threat monitoring via Rapid7 integration



Policy enforcement without disrupting business operations

INDUSTRY

Financial Services

EMPLOYEES

400+

HQ

New York City, NY

DEPLOYMENT

Salesforce, Microsoft 365, GitHub, Duo, Zoom, and Snowflake

USE CASES

SaaS Configuration Visibility
Continuous Compliance Monitoring
SaaS Security Posture Management
Threat Detection

ABOUT

U.S.-based investment management firm that specializes in actively managed equity and fixed income strategies designed for institutional and professional investors.



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Deputy CISO, Global Asset Management Firm

The Challenge

A global asset management firm set out to secure its expanding SaaS environment while meeting strict regulatory requirements such as the NIST Cybersecurity Framework and SWIFT Customer Security Controls Framework, and internal compliance requirements. With Salesforce, Microsoft 365, and Snowflake at the core of the company's operations, the stakes for governance, risk, and compliance were critical.

The company's Deputy CISO highlighted the growing risk landscape, particularly as third-party SaaS adoption increases. "The need for a SaaS Security Posture Management application is critical to the life of a company at this point," he said. "Third-party risk has drastically increased in the last five years."

Tools like cloud access security brokers (CASBs) offered limited visibility, and the data aggregated in the organization's security information and event management (SIEM) platform lacked SaaS context. "We looked at SaaS security more from a DLP lens," the Deputy CISO said. "But that wasn't enough. What we really needed was governance, configuration monitoring, and the ability to identify malicious or misconfigured behavior."

The company also faced top-down pressure to comply with a Salesforce security policy its parent company required. Without a way to continuously validate settings, the company risked potential audit failures. "It's all about protecting customer data," the Deputy CISO explained. "Regulation is expected, but it's really about brand risk and maintaining client trust."

The firm turned to AppOmni to close the gaps.



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Requirements

To secure its SaaS environment, the company needed a solution that aligned with internal policies, scaled across platforms, and delivered immediate value. Customization, speed of deployment, and integration with existing tools like Rapid7 were non-negotiable.

Must-have capabilities included:

- Visibility into configuration settings
- Continuous compliance monitoring
- Easy deployment without disruption to critical systems
- Seamless SIEM integration
- Reliable uptime and actionable metrics
- Support for custom and out-of-the-box policy enforcement



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The Results

Utilizing AppOmni, the firm onboarded Salesforce and quickly expanded to Microsoft 365, GitHub, Duo, Zoom, and Snowflake. The team integrated AppOmni with Rapid7 InsightIDR to stream security findings directly into its SIEM and enable 24/7 threat monitoring, enabling near real-time detection of misconfigurations and unauthorized changes.

"AppOmni gave us the visibility, the monitoring, and the policy governance we were missing," the Deputy CISO said. "We saw value right away. Literally from day one. If someone went rogue or something changed, we knew about it."

The most tangible impact came during a SaaS audit led by their parent company. Among seven business units, only this company passed with zero findings. "That was a big win for us," the Deputy CISO said. "We were the only ones that passed the audit because we had AppOmni. Our reports were airtight."

Together, these outcomes helped the company strengthen its SaaS security posture, reduce audit risk, and establish a scalable governance framework across platforms.

Next Steps

Building on its success with AppOmni, the company plans to expand its SaaS security posture further. The security team has already pushed for support of additional applications such as Microsoft Fabric.

The Deputy CISO emphasized the importance of maintaining visibility and control across an expanding SaaS ecosystem.

"If you want clear visibility of your SaaS ecosystem, you need to look at AppOmni," the Deputy CISO said. "It gives you governance, monitoring, and compliance, all in one. We feel more secure today, 100%."

About AppOmni

AppOmni, the leader in SaaS Security, helps customers achieve secure productivity with their applications. Security teams and owners can quickly detect and mitigate threats using unmatched depth of protection, continuous monitoring, and comprehensive visibility. Trusted by the world's largest enterprises, AppOmni specializes in securing diverse SaaS environments. For more information, please visit <https://appomni.com>.



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He also noted AppOmni's architectural advantage in supporting ongoing growth.

"Architecturally, AppOmni has it right," the Deputy CISO added. "The more SaaS applications you support, the more valuable the solution becomes."