



CASE STUDY · SECURE NETWORKS

Protecting a Distributed Workforce with FortiSASE

A multinational financial institution operating across offices, remote workers and co-working spaces in multiple jurisdictions. Like all firms in financial services, it handles highly sensitive data under significant regulatory scrutiny, making the security of its users, devices and applications a board-level priority wherever work is done.

IN THIS STORY

Formation Tech were engaged to help the institution standardise and secure its workforce wherever they worked. The engagement resulted in the deployment of a Fortinet SASE solution encompassing cloud gateway, localised firewalls and centralised alerting and monitoring, alongside Zero Trust controls protecting a proprietary client-facing application, all delivered and managed end-to-end as part of an ongoing managed service.

01

CHALLENGES

Standardising a Distributed Workforce

Modern financial services firms no longer operate from a single, controlled office environment. This institution's workforce was spread across a collection of offices, remote workers, and co-working spaces, each representing a different network, a different set of risks, and a different level of underlying control. For a sector where data sensitivity and regulatory expectations are high, **that variability had become a problem.**

The organisation recognised the need to standardise how its data and users were secured, wherever they worked. Security applied unevenly across locations is, in practice, **security applied at the level of the weakest link**, and that level needed to be substantially higher than the existing setup could guarantee.

Alongside the broader workforce security challenge, the customer operated a proprietary cloud-based, client-facing application that held particularly sensitive data. Access needed to be tied down tightly, limited to specific people, governed by strong identity and posture checks, and **protected by genuine Zero Trust principles** rather than perimeter-style assumptions.

02

SOLUTION

FortiSASE with Zero Trust at the Core

Formation Tech designed and deployed a Fortinet SASE solution, a single, standardised security framework spanning the organisation's offices, remote workers and co-working spaces. It **encompassed a cloud gateway, localised firewalls at the office locations, and centralised alerting and monitoring.**

The local firewalls handled routing and management at each site, so **office traffic could be treated as a higher-trust source** within the wider framework.

For the customer's proprietary cloud-based client-facing application, Formation Tech implemented Zero Trust principles, tying access to user identity, device posture and two-factor authentication, so sensitive data could only be reached by **the right people, on the right devices, in the right security state.**

Formation Tech delivered the engagement end-to-end, designing, implementing and managing it on an ongoing basis, including service issues and the enhanced reporting the customer required.

03

OUTCOMES

A Standardised, Managed Posture

The institution now operates a standardised security posture across every type of location it works from. Whether in a major office, a co-working space or working remotely, the same framework, controls and visibility apply. For a firm in financial services, that consistency is **the foundation of a defensible security position.**

The proprietary client-facing application is now protected by Zero Trust controls that **bind access to user identity, device posture and two-factor authentication.** The most sensitive data is no longer reachable on credentials alone.

Operationally, Formation Tech provides ongoing design, implementation and managed service delivery. The result is **a single, unified, professionally managed SASE framework** that secures the workforce wherever they work and protects the institution's most critical application under Zero Trust.

For a distributed firm in a highly regulated sector, the value was not just in the technology; it was in replacing uneven, location-by-location security with one unified framework, and in binding access to its most sensitive application to identity, device posture and strong authentication.

RESULTS AT A GLANCE

1

Unified SASE framework across offices, remote and co-working environments

Zero Trust

Identity- and posture-based access to the critical client-facing application

2FA

Strong authentication enforced on sensitive data access

Managed

End-to-end design, implementation and enhanced reporting

Standardise your network security.

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