



\$48B AUM PRIVATE EQUITY FIRM TRANSFORMS SECURITY POSTURE WITH AGIO'S INTEGRATED GOVERNANCE & OPERATIONS

A private equity firm evolved from basic security monitoring to a comprehensive cybersecurity and governance program through a trusted partnership with Agio.

An aerial, high-angle photograph of a complex highway interchange at night. The image is characterized by long-exposure light trails from vehicles, creating a series of concentric, overlapping golden-yellow arcs that dominate the frame. The roads are dark, and the surrounding landscape is mostly black, with some greenery and distant lights visible. The text is centered over the middle of the image, overlaid on a semi-transparent dark area.

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is based on true
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THE CHALLENGE

When a \$48B private equity firm lost confidence in their cybersecurity vendor after a serious breach of trust—the misdelivery of confidential data—they restructured their security partnerships. Because the CISO's strategy focused on leveraging trusted partners rather than building out a large internal team, he wanted a security partner who could serve as an extension of his organization and augment existing relationships while delivering comprehensive security operations and regulatory compliance expertise. He chose Agio because of its deep roots in the alternative investment industry and its understanding of regulatory requirements.

THE SOLUTION

Agio proposed a hybrid approach to preserve existing relationships while significantly enhancing the firm's security capabilities. Importantly, Agio's turnkey security solution provided the coverage the CISO needed, without impacting the IT team's workflow.

Agio's approach was centered around seamless integration between security operations and governance—a unique approach in an industry where these functions typically operate in silos. With Agio's Director of Cyber Operations leading the vCISO program, the client created a natural bridge between day-to-day security monitoring and broader governance initiatives. This integration meant that security findings directly informed governance decisions, while governance requirements shaped operational priorities.

On the governance side, Agio's clearly defined roadmap established regular strategic advisory sessions, thorough security assessments, and systematic compliance documentation. The program transformed routine security tasks—from tabletop exercises and firewall reviews to policy assessments—into a cohesive SEC readiness program that was easy to implement and maintain while providing comprehensive threat monitoring, vulnerability management, and incident response, all supported by direct access to senior security analysts.

The AgioNow customer portal provided centralized access to all security and compliance information. As the single source of truth for program deliverables, cyber operations metrics, and SEC examination readiness, AgioNow transformed what could have been a complex web of security tools and documentation into a streamlined, strategic asset—particularly valuable for SEC examination readiness and ongoing program optimization.



THE OUTCOME

The partnership transformed the firm's security posture from lacking to mature, delivering multiple critical business outcomes:



Enhanced SEC Examination Readiness

The AgioNow portal serves as a comprehensive repository for SEC examination preparation, housing everything from historical program deliverables to current security metrics in one accessible location.



Streamlined Due Diligence

The program significantly improved efficiency in responding to investor due diligence questionnaires (DDQs), helping put investors at ease about the firm's security stance.



Improved Third-Party Risk Management

The firm positioned itself ahead of increasing SEC focus on third-party risk management, reducing potential regulatory exposure.



Deeper Operational Integration

What began as a typical security monitoring relationship evolved into a strategic partnership, with Agio's most senior analysts directly involved in extracting value from existing security controls.



Enhanced Visibility and Control

Beyond providing fragmented security data, Agio conducted comprehensive reviews of each security control alongside the client's IT team, ensuring maximum value and effectiveness from their existing toolset while delivering clear, actionable intelligence through a single dashboard.

These results were possible because the client-Agio relationship evolved beyond traditional security metrics like log counts or alert volumes and operates across three levels of engagement. At the executive level, leadership from both organizations is actively involved, focusing on continuous service improvement and strategic direction. The technical teams operate as peers, engaging in collaborative strategy sessions beyond routine updates to address emerging challenges and opportunities. At the operational level, Agio's senior analysts work closely with the firm's IT team to improve its security posture and derive more value from the existing tools in place, taking ownership of security outcomes through hands-on collaboration that ensures no control or configuration falls through the cracks.



The unprecedented level of trust has led the CISO to grant Agio a degree of technical access rarely provided by the firm, allowing for comprehensive monitoring of network traffic and internal user activities. This level of access—typically guarded carefully by financial firms—enables Agio to function as a true extension of the internal team rather than just another vendor.

CONCLUSION

This partnership is based on true collaboration and trust. Instead of simply monitoring logs and sending alerts, Agio built connections at every level—from the executive suite to daily operations—creating a relationship based on open communication and shared goals. By combining cyber operations and governance under one roof, Agio turned routine security tasks into strategic advantages, while working effectively alongside existing vendors to create a more comprehensive security program. The result not only meets today's compliance requirements but positions the private equity firm for continued growth in an increasingly complex regulatory environment.



WHY AGIO?

#OneAgio

When you select Agio, you're investing in a relationship with everyone who's a part of this firm. Our teams operate in a symbiotic relationship to deliver an experience that reaffirms to our clients we've got you covered. From clean, concise implementations to consistent support backed by automation, value-add reporting, and thought leadership on the latest IT and cybersecurity trends, we bring the full breadth and depth of our talent to bear.

We deliver #OneAgio.

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