

# Customer Success Story

## *BEYOND COMPLIANCE*

Infinite Investment Systems  
proactively navigates data  
risk management with  
LightBeam



# OVERVIEW

The [Infinite Investment Systems](#)' mission is to deliver secure, reliable, and scalable foundation technology platforms to the wealth technology industry. Given the sensitive nature of the financial data entrusted to them by clients, safeguarding this information is essential. The company maintains an unwavering commitment to integrity and transparency with clients, fostering a collaborative ethos and staying ahead of privacy and risk management protocols.

Infinite Investment Systems sought out LightBeam as a strategic partner to further fortify its data security measures — mitigating data risk and bringing them always a step ahead of regulatory requirements.





The Infinite Investment Systems team required a tool that could scan incoming and outgoing email traffic — across Outlook, SharePoint, OneDrive, Teams, and Amazon Simple Storage Service (S3). They needed assistance moving away from the very manual, and therefore time-consuming, process of managing data across these sources. They also required a hosted solution ensuring there was no third-party access to their client data; they didn't want an online solution.

***After evaluating three other tools, LightBeam came out on top.***

LightBeam had a few core differentiators right away:

- **Easy to use:** It had the cleanest UX and was the easiest to move around
- **The right data source connections:** LightBeam was the simplest to connect with their current data sources, especially since the team was fine working with Canadian data stores— a critical qualification for the Infinite team, which keeps all data in Canada. LightBeam also constantly adds new data sources
- **Self-serve compliance workflows:** LightBeam made compliance simple. LightBeam Privacy Ops connects to data sources to capture customer consent, ensuring consistency and adherence to policies.



***“If a data breach occurred, it could have been a \$100,000 dollar issue. Now, using LightBeam, the cost of potential data breaches becomes zero.” – Chris O’Leary, COO of Infinite***

## ***The Infinite team Increases revenue by mitigating risk***

Data breaches are incredibly costly. Not only do they lead to financial losses, they do significant damage to company reputations and can have legal ramifications. The LightBeam platform clearly identifies risks associated with access to sensitive data, both from inside and outside of the organization. With continuous monitoring of sensitive data sharing, Infinite can now get alerted on any unauthorized external sharing of data within a few seconds.

LightBeam has created peace of mind that Infinite Investment Systems can manage and protect all client data, avoiding data breaches and their consequences.

## ***Adhering to existing and new privacy regulations is a no-brainer***

Law 25 is the latest and most significant privacy



legislation development in Canada, following the 2021 adoption of Bill 64, which enacted significant changes to the requirements governing the collection, use, and communication of personal information. The Infinite team needed a way to easily ensure adherence to these regulations, and LightBeam helped them achieve it.

The Infinite team has clients with exposure to Europe too, so GDPR compliance is also essential.

LightBeam helps the team feel extremely well-prepared to meet the requirements of these current regulations and for more compliance laws to come, with minimal manual work from teammates (and therefore lots of time saved).

## ***Simple, customized setup and training allowed for efficient and productive onboarding***

The LightBeam product was super easy for the team to bring on; the Infinite team went through the whole process of setting it up in just one afternoon.

The best part of the setup for Infinite Investment Systems was the personalized nature of the process and the feasibility of assessing and adding new features as needed. The Infinite team emailed the LightBeam team about something new they wanted to implement, and



***“The customer service bar is really high. We email them, and they respond right away. They’ve been advocating for more meetings and we’re like, ‘This is one of the hundreds of things we’re working on right now!’ It’s a really good problem to have actually. The proactivity and communication from their team is super strong.” – Chris O’Leary, COO at Infinite Investment Systems***

the LightBeam team could meet the request right away. The Infinite team had custom, sensitive terminology, and LightBeam handled the proprietary info and personalized the platform for them with care. The moment they said two-factor authentication would be incredible to safeguard all of the private data, the LightBeam team made it happen.

The customization factor was a key differentiator — it helped make the onboarding process seamless and the tool super beneficial right off the bat.

***A tight-knit relationship with the LightBeam team enables quick changes and ample support***



In addition to the level of personalization the tool and team offer, the Infinite team has found working with the LightBeam team smooth and collaborative. The very synergistic spirit and energy of the two teams enable them to problem-solve faster and create the most optimized solution for Infinite's challenges and changing needs.

As the Infinite team continues to scale, LightBeam will grow alongside them.

In the future, Infinite Investment Systems plans to start offering LightBeam as a service to some of their clients through their Professional Services Team — in the finance world, clients have the same regulatory requirements to follow (and sometimes even more!)

**They see LightBeam as a critical tool to recommend to help clients more easily automate compliance, saving time for the team to work on other critical work.**

Infinite Investment Systems' partnership with LightBeam has fortified their data security measures, enabling them to achieve their mission and better serve the wealth technology industry.

# ABOUT LIGHTBEAM

## ZERO TRUST DATA PROTECTION

Powered by Generative AI

LightBeam.ai converges data security, privacy, and AI governance, so businesses can secure their data across cloud, SaaS and on-prem locations. Leveraging generative AI, LightBeam ties together sensitive data cataloging, control, and compliance across structured (databases), unstructured (file repositories), and semi-structured (ticketing systems) applications. LightBeam enables you to start down the road of your zero trust data protection journey.

For any questions or suggestions, please contact us at:

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