

# Platform, people and policy close Cone Marshall's cybersecurity gap



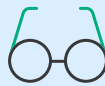
Success Story  
Cone Marshall

Industry  
Financial



## Integrated IT + security

One provider for Modern Workplace, Intune and Cybersecurity



## Full visibility

Detailed incident reports with steps taken and recommended actions



## Reduced human risk

Staff trained to spot and stop phishing and social engineering

## Background

Cone Marshall is a specialist law and trust firm that helps clients protect, manage, and pass on their wealth. Part of an international group, the NZ office provides tailored trust, wealth management and administrative services for families, trustees and advisers around the world.

For Cone Marshall, keeping its systems secure could not be more important. It manages vast sums on behalf of ultra-high-net-worth clients.

It's quite scary how quickly things could go wrong.

**Claire Cooke**  
Managing Director  
Cone Marshall



## The need: connected, highly responsive cyber security services

While large-scale theft is very unlikely, even minor breaches could have devastating consequences for the firm, opening it up to legal risk and, perhaps most important, reputational damage, says Managing Director Claire Cooke.

With the stakes so high, Cone Marshall had moved its Cybersecurity needs to a newly formed specialist company in 2019, keeping day-to-day IT support with CodeBlue. As time went on, Cone Marshall realised they needed more support to ensure serious threats were dealt with promptly and low-level threats weren't being escalated unnecessarily.

Claire says a single provider for both IT and Cybersecurity services would also reduce complexity and workloads for the Cone Marshall team.

## One provider, one plan, zero gaps

When the firm began implementing Microsoft Modern Workplace, Claire saw the opportunity to bring Cybersecurity back under CodeBlue's roof – combining IT support, Intune device management and Cybersecurity in one place. With CodeBlue's expanded Cybersecurity team, Claire says reconsolidating the IT services just made sense.

Not long after, the CodeBlue team uncovered a couple of threats while working on a different project.

"That really cemented that decision," says Claire.

CodeBlue immediately implemented SentinelOne across Cone Marshall's laptops, offering a month free to keep the systems secure even while the firm transitioned.

The amount of support we had from CodeBlue was exceptional.

**Claire Cooke**  
Managing Director  
Cone Marshall



**\$0**

**Zero cost  
assessment  
& roadmap**

## Getting ahead of threats

When it comes to Cybersecurity, no news is very much good news – it means the team is getting in front of threats before they cause any issues.

That's been the case with Cone Marshall and the CodeBlue security team.

For incidents that do crop up, Claire says the detailed reports give her the visibility she was lacking.

"When there's an incident, I need to know what steps I should take. I've been really impressed with the reports – they're incredibly valuable."

Needless to say, the late-night calls have stopped. Instead, the CodeBlue team quietly monitors emerging threats, looping in Cone Marshall when action is needed.

"Having CodeBlue support with that is invaluable... when there's a new threat, we get told about it."

While CodeBlue has the technical side of things well managed, it also minimises the human risk factor with Phished security awareness training. The concise modules help strengthen people against social engineering attacks, using phishing simulation and positive reinforcement.

"When you report a phishing email, you get a congratulations email. More and more people are [reporting phishing] since they've done the training modules, which shows it's working."

## Setting the international standard

CodeBlue's services also extend to the governance level, helping to develop an incident response framework, guide policy, and advise on cyber insurance compliance. It's also helping Cone Marshall work towards achieving accreditation with the U.S. National Institute of Standards and Technology.

While Cone Marshall has only just embarked on this part of the journey, Claire is confident it's on the right track.

And next? Claire has her sights set on the organisation's sister offices.

"We're already well on the way to having excellent protection, but we have limited control over what happens in other offices."

So that's the next step – expanding it, so other offices are working more the way we do in New Zealand.

**Claire Cooke** | Managing Director | **Cone Marshall**



Get in touch with the team today.

**0508 48 73 78**  
**codeblue.co.nz**

**FUJIFILM**

**codeblue**  
IT services

[info@codeblue.co.nz](mailto:info@codeblue.co.nz) | 0508 IT SERVICE | [codeblue.co.nz](https://codeblue.co.nz)

