Synoptek

Case Study

Modernizing the IT Core of a Global Fiduciary Services Firm with **Cloud** and **Managed Services**

Customer Overview

Customer

Circumference FS

Profile

Circumference FS is a global provider of professional and fiduciary services for institutional and private clients, with operations across the Cayman Islands, Luxembourg, the United Kingdom, and the United States.

Industry

Financial Services / Fiduciary & Entity Management

Services

Network Deployment and Security, Microsoft 365 Migration, Application Migration & Modernization, Teams & Real-time Communications, SharePoint Migration, End-user Services, IT as a Service, and Managed Services Onboarding.

Business Need

Following the acquisition of the Entity Management business from Wilmington Trust, Circumference FS needed to rapidly establish IT independence while ensuring operational continuity. The transition required execution across multiple workstreams under tight timelines, with minimal disruption to business operations.

Key challenges included:

- Supporting a time-bound transition period while building a long-term IT foundation
- Migrating applications, data, and users from a legacy parent environment
- Establishing secure network, cloud, and collaboration platforms
- Onboarding users, devices, and managed services at scale
- Coordinating multiple parallel projects across infrastructure, cloud, applications, and end-user services
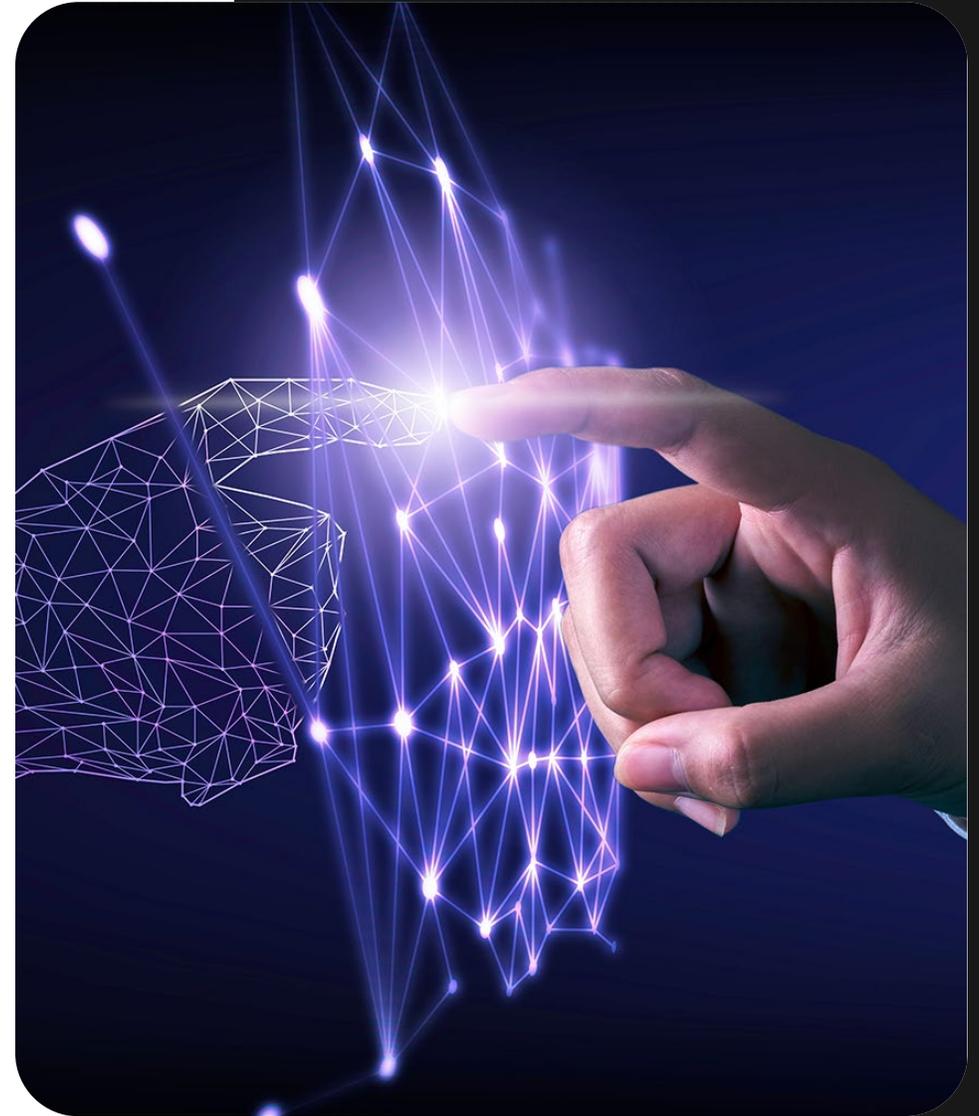
Solution and Approach

Synoptek was engaged as a strategic partner to deliver a structured, minimally disruptive transition program, combining professional services and managed services across core IT domains.

The engagement was executed through organized workstreams, with dedicated program management for cross-domain team coordination:

Network & Security Deployment
Delivered new internet circuits, hardware installation, on-prem and cloud firewall deployment, and secure network configuration.

Microsoft 365 Tenant Migration
Executed data synchronization, validation, and cutover to a new Microsoft 365 tenant to support email, collaboration, and productivity.

SharePoint Migration
Migrated enterprise data to SharePoint Online to replace legacy file-sharing platforms.
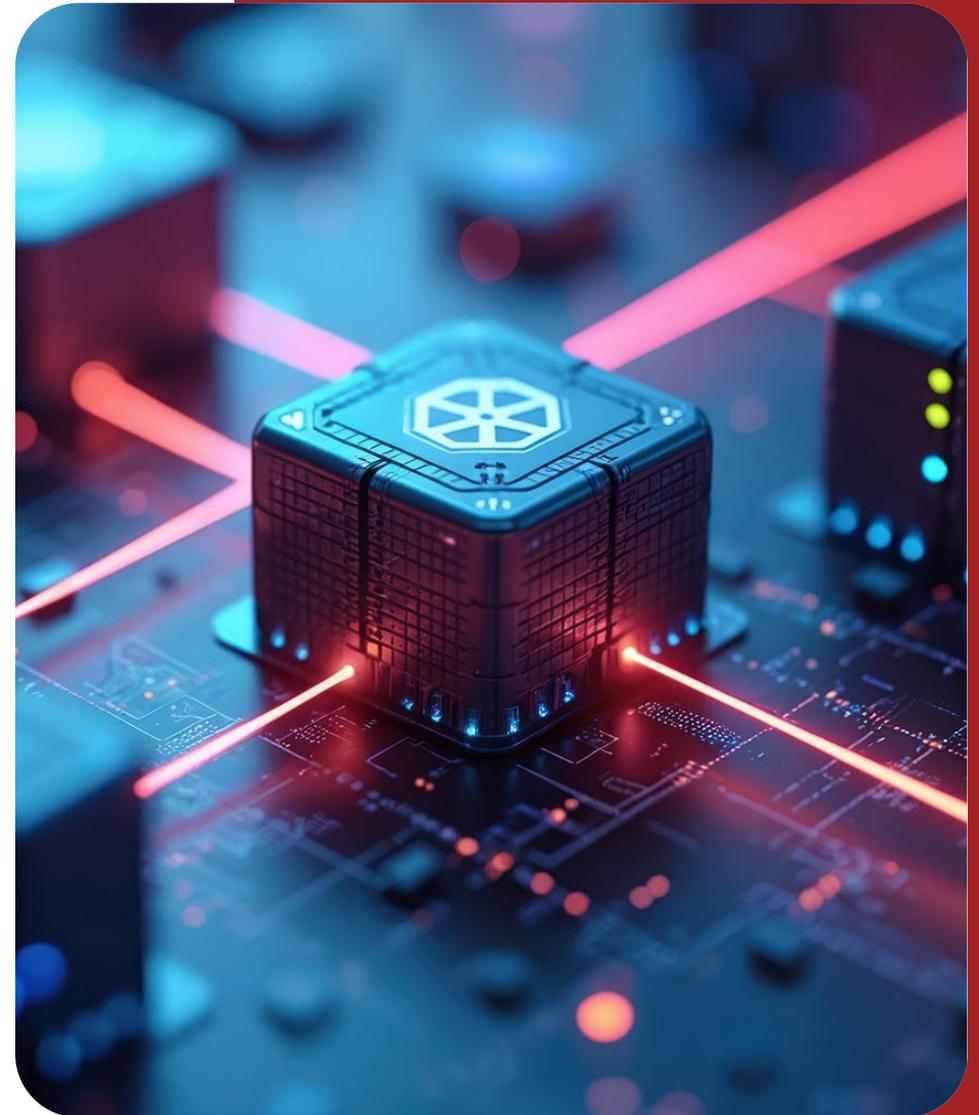
Solution and Approach Contd...

## Application Migration, Modernization & Customization

- Transitioned business applications to a new environment, including setup, data migration, testing, customization, and post-go-live support.
- Retired some of the existing third-party applications and moved those features into the core business application with a modern technology stack.
- Integrated with the latest version of some third-party applications like SAGE.

Real-time Communications

Enabled Microsoft Teams Phone and collaboration services, including number porting, tenant build-out, training, and cutover.

End-User & Managed Services Onboarding

Onboarded Azure, application support, MDM, ITaaS users and sites, and collaboration services under Synoptek managed services.
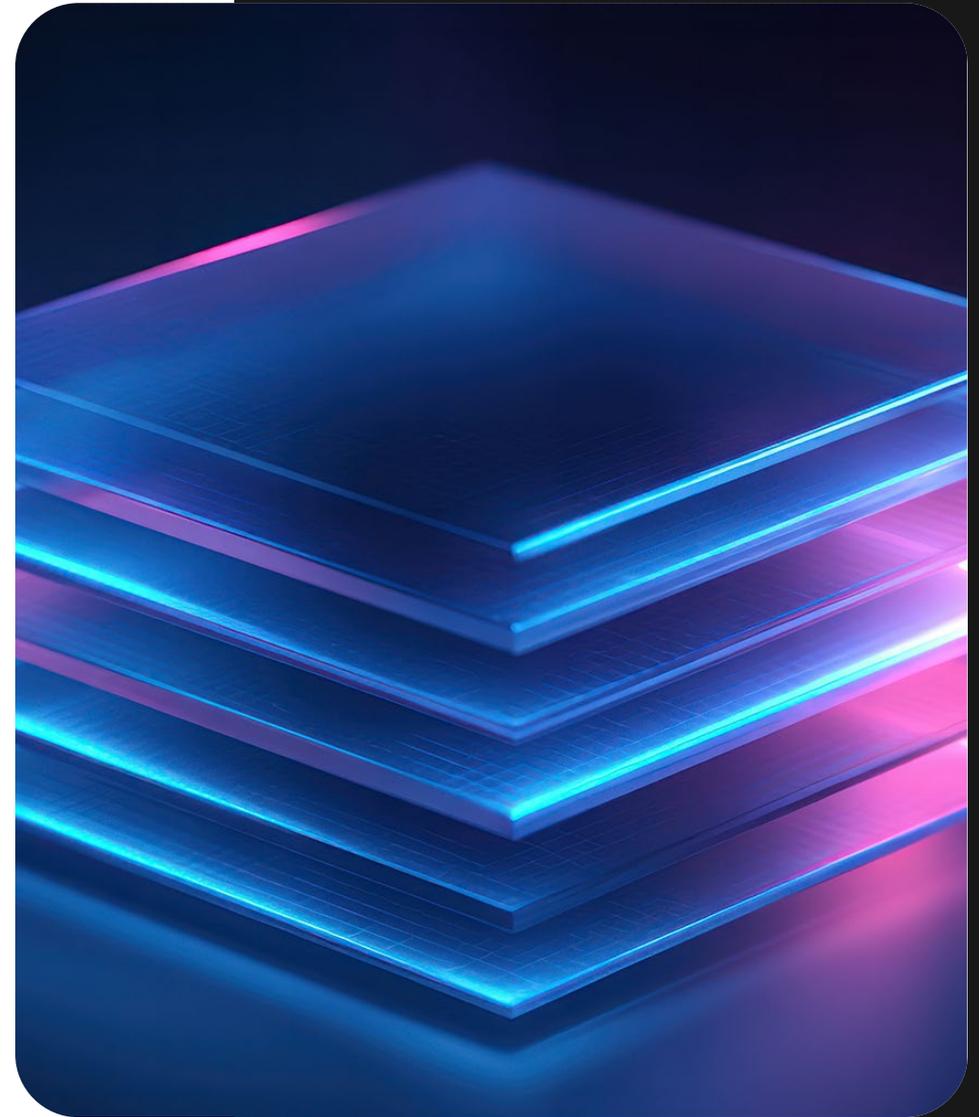
Business Benefits

Synoptek supported Circumference FS through a complex post-acquisition IT transition, delivering coordinated execution across application development, infrastructure, cloud migration, and end-user services. The engagement established a stable, secure, and scalable technology foundation, positioning Circumference FS for long-term operational success and continued growth.

Operational Independence

Enabled a smooth separation from the former parent organization, establishing a fully independent IT environment.

Secure & Scalable Foundation

Built a secure and scalable IT infrastructure across cloud, network, and collaboration platforms to support ongoing operations.

Business Continuity

Ensured uninterrupted business operations throughout a complex transition period.

Future-Ready IT Environment

Positioned the organization for ongoing managed services support and future optimization initiatives.

User Enablement

Streamlined onboarding through modern tools and standardized processes, accelerating user adoption and reducing the post-transition learning curve.

"*Synoptek's partnership and hands-on support during our transition have been invaluable. Their willingness to spend time onsite, understand our needs, and collaborate closely with our team has given us great confidence in our technology roadmap. We truly value their expertise and commitment as we build a strong foundation for the future.*"

– William Langan, Director and Senior VP

About Synoptek

Synoptek is the first IT Managed Experience Provider (MxP^{TM}), delivering AI-enabled automation, strategic modernization, and experience-led outcomes. Its services span Cloud and Agile Infrastructure, Business Applications and Platform Development, Customer and Employee Experience, and Cybersecurity. With a business-first approach and a global delivery model, Synoptek helps organizations optimize operations, accelerate transformation, and achieve measurable results—guided by a culture rooted in growth, ownership, inclusiveness, and philanthropy.

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