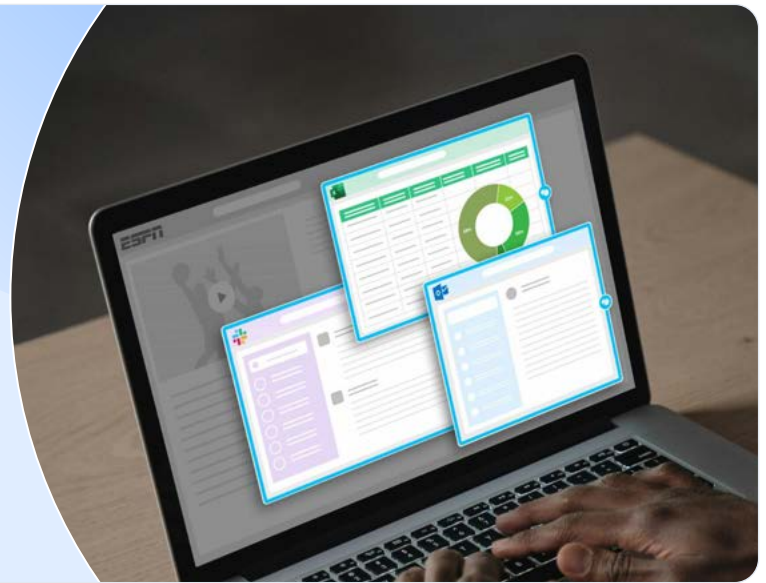


CASE STUDY

How Capitalize Cut Infrastructure Costs 67% by Replacing Azure Virtual Desktop with Blue Border



67%

Cost savings compared to Azure Virtual Desktop

75+

Users across US and Philippines

SOC 2

Compliance maintained post-migration

ABOUT CAPITALIZE

Capitalize is a modern fintech platform that simplifies 401(k) rollovers for individuals and employers. The company operates with customer service teams across the US and the Philippines, handling sensitive financial data for thousands of clients. As a SOC 2-compliant organization, Capitalize maintains rigorous security standards across every endpoint and employee.



The Challenge: A Virtual Desktop That Created More Problems Than It Solved

When your customer service team handles people's retirement savings, reliability is everything. But for Tim Seibert, Senior Operations Manager at Capitalize, every morning started with an open question: would Azure Virtual Desktop (AVD) actually work today?

Capitalize was using AVD to maintain a clean, secure environment for their remote customer service staff – a team of 75 and growing, split between the US and the Philippines. The logic was sound: a fully managed virtual desktop kept sensitive data off unmanaged devices, and helped satisfy the company's SOC 2 compliance requirements.

In reality, the experience was a source of friction. Connectivity dropped without warning and sessions ran slow and laggy. Agents would arrive at their workstations unable to connect, and the domino effect hit the whole operation.

The cost picture was also difficult. AVD licensing, combined with

the overhead of a managed service provider (MSP) to run and support it, was running roughly three times what the company would eventually pay for an alternative. And that MSP relationship had its own problems: accidental outages, configuration errors, duplicate account creation. The instability was quietly creating security exposure.

"We didn't have as good visibility as we wanted," Tim recalled. When agents couldn't connect in the morning, the practical response was to start poking holes – workarounds to get people up and running that undermined the very security boundaries the VDI was meant to enforce. When Capitalize transitioned to a new MSP, they discovered a significant number of security loopholes that had gone unnoticed under the old setup.

Tim knew what he was looking for: a stable environment where he didn't have to come in at 9 AM to a surprise. The search for something better led him to Venn.

"Azure usage was probably 3x the cost of Venn – and that's not including what we were paying our MSP to manage it." - Tim Seibert, Senior Operations Manager at Capitalize



The Solution: Blue Border™ on the Devices Workers Already Had

Blue Border™ is a secure enclave that installs directly on an employee's or contractor's own PC or Mac. Work activity runs inside the enclave – protected, company-controlled, isolated – while personal activity stays completely outside it. There's no virtual machine to maintain, no remote desktop to connect to, and no VDI session that can drop in the middle of a shift.

For Capitalize, the fit was immediate. Their US remote workers had been issued Chromebooks – adequate hardware, but a particularly painful combination with VDI. A slow virtual desktop running on a slow device produced an experience that Tim described as “a computer within a computer.” It was naturally sluggish, and when sessions lagged or dropped, productivity stopped.

The team made a hardware decision in parallel: migrate US remote workers from those Chromebooks to MacBook Airs. Paired with Venn, the result was a fundamentally different experience: local

apps running at native speed, inside a secure enclave, on hardware that actually felt fast.

For the Philippines team, the impact was also significant. Running Blue Border on locally procured Windows laptops, agents went from the unpredictability of a remote session – dependent on cross-Pacific connectivity and often bogged down by latency – to a local compute experience that performed like any well-configured workstation.

And critically, the security posture improved. Blue Border gave Capitalize's IT leadership clear visibility into what was happening inside the work enclave, without requiring surveillance of employees' personal activity. The workarounds and loopholes that had accumulated around AVD's reliability failures had no equivalent here.

“I got nothing but complaints from people all the time – and this is the first time I'm getting compliments.” - Tim Seibert, Senior Operations Manager at Capitalize



The Results

The changes Tim had been hoping for materialized quickly after the transition to Venn.

Capitalize cut its infrastructure cost by roughly two-thirds – from a combined VPN, AVD licensing and MSP bill that was running approximately 3x what the company pays for Blue Border today.

Reliability stopped being a morning conversation. In the weeks after migration, IT support tickets related to connectivity and session failures dropped to near zero compared to what had been a daily occurrence under AVD. The 9 AM scramble simply disappeared.

The team noticed. Tim manages an operations environment where feedback tends to surface when things go wrong. After the migration, the feedback flipped. “I got nothing but complaints from people all the time,” he said, “and this is the first time I'm getting compliments.”

Capitalize's most recent SOC 2 audit covered the Blue Border deployment without issue. The secure enclave model satisfies the same audit controls that previously required a fully managed virtual desktop.



Looking Ahead

Capitalize handles retirement savings for thousands of clients across the US – the kind of operation where security failures and compliance gaps have real consequences. They're now expanding into North Carolina, building on a foundation that doesn't require VDI infrastructure or an MSP to keep it running. Today they run that operation in Blue Border, at a third of what AVD cost them, with no morning fire drills and no configuration mistakes to fix.



**Secure Your Remote Workforce
in Minutes. Not Weeks.**

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