



Case Study:

Insycle's Security Standard Compliance Initiative

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Executive Summary

Insycle, a fast-growing data management platform founded in 2016, embarked on a strategic initiative to elevate its information security posture to meet globally recognized standards such as ISO 27001. This move was driven by a desire to ensure customer trust, support enterprise clients, and lay the foundation for scalable, secure growth.

To achieve this, Insycle engaged Cloud Pathfinder Services, led by Don Milligan, to support infrastructure modernization and guide the compliance journey. Through strategic planning, security tool integration, architectural enhancements, and cross-functional collaboration, Insycle not only achieved its compliance goals but also strengthened its overall technical operations.

Background

Headquartered in Lower Manhattan, New York City, and founded in 2016, Insycle has emerged as a trusted platform for CRM data management.. It offers powerful, no-code tools to help organizations clean, organize, and maintain high-quality customer data across systems like Salesforce, HubSpot, Intercom, and more.

As Insycle scaled, serving more enterprise customers and handling sensitive CRM data at scale, it became critical to formalize and harden its security and infrastructure practices to align with top-tier compliance frameworks.

Challenge

To meet growing client demands and adhere to the highest levels of data and application security, Insycle initiated an organization-wide audit and set a goal of aligning its infrastructure with ISO 27001 and other globally recognized information security standards.

This initiative required not only a technical uplift of core infrastructure but also ongoing system-wide audits, access control improvements, and a more robust environment separation strategy to meet compliance and operational maturity.



Solution

Cloud Pathfinder Services, under the leadership of Don Milligan, partnered with Insycle to design and implement a comprehensive security and infrastructure enhancement plan. Key areas of focus included:

- Continuous Security Auditing: Deployment of automated tools to scan and monitor infrastructure for vulnerabilities and compliance gaps.
- Best Practice Architecture: Reengineering of core infrastructure to follow modern cloud security and scalability patterns.
- Environment Segmentation: Introduction of separate environments (e.g., staging, production, development) to enforce least privilege access and improve control over data workflows.

Implementation

Cloud Pathfinder Services took an active role in both strategic planning and day-to-day execution of the compliance roadmap. Working in close collaboration with Insycle's internal teams, Don led regular work sessions, scheduled key stakeholder meetings, and ensured visibility at every step of the transformation.

This collaborative, transparent approach minimized disruption, reduced compliance risk, and ensured alignment between development, operations, and leadership teams throughout the project lifecycle.

Results

Insycle successfully achieved its security compliance goals and, with guidance from Cloud Pathfinder Services, implemented further improvements to enhance long-term resilience and performance.

The success of this engagement has laid the groundwork for an ongoing partnership. As of 2025, Insycle and Cloud Pathfinder Services continue to collaborate on new infrastructure and operational initiatives, helping the company remain at the forefront of secure and scalable customer data management.



Client Testimonial

"To Whom It May Concern,

Cloud Pathfinder Services Inc. played a pivotal role in helping Insycle design and engineer a best practice architecture and achieve SOC 2 Type 2 compliance across our platform.

Don Milligan provided strategic direction paired with hands-on leadership throughout the engagement, acting as both a seasoned information security expert and an exceptional crossfunctional collaborator. . .

. . . We deeply valued Don's strategic contributions, and would gladly work with him again.

I highly recommend him to any organization in need of a trusted, senior level advisor.

Sincerely,

Yonatan Lee
Founder & CEO"



****A full recommendation letter from Yonatan is available upon request.**