

BridgeBuilder Tax & Legal

CASE STUDY

Strengthening Security & Streamlining IT Operations

OVERVIEW

BridgeBuilder Tax & Legal is a tax and legal services firm with a team of about 30 employees. Barbara Marah, Office Manager, oversees the organization's day-to-day operations, including its technology and security needs. Today, the firm partners with IP Pathways for **TotalTech+** and **Security Posture as a Service (SPaaS)**.

FACING THREATS WITHOUT A SECURITY FOUNDATION

Like many small organizations, BridgeBuilder Tax & Legal doesn't have a dedicated IT team, which means Marah, as Office Manager, often must manage technology challenges on top of her regular responsibilities.

Before adopting Security Posture as a Service, the firm had no formal security measures in place. That gap became especially clear in 2024, when BridgeBuilder experienced a ransomware attempt that arrived through email. "In 2024 we had an incident where an email attack asked for ransom money," Marah explained. "That was our motivation to get something in place."



No dedicated
IT team



No formal security
measures



2024 ransom
attempt

ADDING TOTALTECH+ & SECURITY POSTURE AS A SERVICE

BridgeBuilder partnered with IP Pathways for TotalTech+, which provides help desk support, proactive monitoring and licensing management. Since starting TotalTech+, Marah has noticed an improvement in day-to-day IT operations. "Our response time is much quicker now," she said.

TotalTech+ also lifted a significant administrative burden off Marah's plate. "IP Pathways took over the majority of our licensing, which has been a big help when onboarding new employees," she said. A dedicated client success resource has made the partnership feel personal rather than transactional.

To close the security gap exposed by the 2024 incident, BridgeBuilder later implemented **Security Posture as a Service (SPaaS)**, which includes continuous security assessments, ongoing employee training and visibility into the firm's security posture score through a platform, Tenax IQ. The service has helped BridgeBuilder build a culture of security awareness without adding to Marah's workload. Between the reminders for training, the software that shows the team who's clicking on what, and having the Client Success Manager to answer questions, it has put BridgeBuilder in a more secure position.

"Meeting with our Client Success Manager has been incredibly beneficial. Having that dedicated resource in tandem with the services has made a real difference."

-Barbara Marah, BridgeBuilder Office Manager

CHANGING FROM REACTIVE TO PROACTIVE

SPaaS has been especially valuable as BridgeBuilder continues to grow. New hires bring new risk, and Marah has seen firsthand how ongoing training changes behavior. "Every time we have new hires, we see an influx of phishing attempts. Now, employees forward those emails to me so we can verify whether they're real, which makes us more secure with every new hire," she said. Overall, the partnership has shifted BridgeBuilders' approach to IT and security from **reactive** to **proactive**.

LOOKING AHEAD

With TotalTech+ handling day-to-day IT support and SPaaS keeping security top of mind, BridgeBuilder Tax & Legal can focus on serving its clients, knowing its technology and security needs are in trusted hands.