

# Forvis Tackles Digital Transformation and M&A Network and Security Challenges with Cato SASE Cloud

## About Forvis

Created in June 2022 by the merger of Dixon, Hughes, Goodman (DHG) and BKD, Forvis is ranked eight on Inside Public Accounting's top 10 public accounting firms. It has approximately 5,400 employees in 70 U.S. locations, plus an office in London and upcoming offices in Toronto and Singapore and provides tax, assurance and audit, and consulting services across more than 30 industries. Before Cato, Forvis relied on a legacy MPLS network to connect offices, with Internet breakouts at each location.

## Forvis Sought a Single Network and Security Solution for Digital Transformation and M&A

Digital Transformation can be painful but tackling digital transformation and mergers and acquisitions (M&A) at the same time is a particularly daunting challenge. Just ask John Bowles.

Bowles was the Chief Information and Digital Officer at Dixon Hughes Goodman LLP (DHG) when in June 2020 the accounting firm merged with BKD, another leading accounting firm, to form Forvis. Today Bowles is the CIO of Forvis, which ranks eighth on Inside Public Accounting's 2022 list of top 100 U.S. accounting firms.

As with many mergers, DHG and BKD had their own infrastructure, which led to an operational challenge. "We had to integrate two very different networks with different staff models," says Bowles. Ultimately, the team decided to standardize on Cato. "The Cato network run by DHG required very little labor to manage and maintain. We really liked Cato for that reason. The network on the other side required a few more people to manage and maintain."

Bowles and his team began migrating the BKD sites onto Cato. This wasn't the first time they faced a site migration with Cato. Prior to the merger, Bowles led DHG's transition from MPLS to Cato. MPLS had been the network solution enabling DHG's thin client architecture, which connected its staff to centralized datacenter services.

"MPLS served us pretty well, but it was expensive, complex, inflexible, and took forever to provision to new locations," says Bowles. Internet access was provided locally at each site.

"We tried backhauling Internet traffic, but it was too complex and too much of a bottleneck to make everyone happy," he says.

### **Bowles Considers SD-WAN Solutions, Chooses Cato**

Aside from the drawbacks of MPLS, it was the challenge of balancing digital transformation with mergers and acquisitions that first led to the decision to deploy a Cato SASE. "Even before the BKD merger, we were growing fast, bolting on other new companies at the same time as the technology landscape around us was transforming dramatically," says Bowles. One strategy for addressing both challenges was to increase the adoption of cloud and managed services. However, doing so created network and security issues that made MPLS look increasingly obsolete.

Bowles and his DHG team started investigating SD-WAN as a more agile, cloud friendly alternative to MPLS. "It was a natural progression," he says. "We didn't know anything about SASE at the time and approached Cato Networks first as an SD-WAN solution."

They evaluated the SD-WAN market with an eye on operational efficiency. "Nobody wanted a small army of network engineers maintaining a very complex environment. We wanted a simple solution that would allow us to be responsive and agile and could scale without us having to redesign or refactor our network," he says.

Other factors in their buying process were network performance and security. "We sought a solution that performed consistently well regardless of country or location, and we were keen to minimize our risk and improve our compliance management."

And Bowles needed a solution that would support the growth and transformation of the firm while maintaining consistent standards and a common network and security infrastructure across it all. "I would say jokingly that it was like driving the car down the highway and changing the tires at the same time," says Bowles.

All of which led him to Cato.

“When you take all those factors into consideration, you eliminate a lot of the other hardware and mixed hardware/cloud approaches.”

## **SASE: The Right Solution for Transformation and M&A**

Bowles decided to deploy Cato SASE Cloud, which would “allow us to scale and be more agile,” he says. Completely cloud-based, Cato SASE Cloud would give Bowles the agility he needed to tackle M&A and transformation challenges simultaneously. Cato optimally connects all enterprise network resources, including branch locations, the hybrid workforce, and physical and cloud datacenters, into a secure global, cloud-native service.

Connecting a location to Cato is just a matter of installing a simple Cato Socket appliance that links automatically to one of Cato’s 75+ Points of Presence (PoPs) and its fast, global private backbone. Cato Edge SD-WAN extends the Cato SASE Cloud to provide prioritized and resilient connectivity over multiple last-mile links in physical locations. At the same time, Cato SDP Client and Clientless access enable secure and optimized application access for users everywhere, including at home and on the road.

Cato’s cloud-native security edge, Cato SSE 360, converges a Secure Web Gateway (SWG), Cloud Access Security Broker (CASB), Data Loss Prevention (DLP), Zero Trust Network Access (ZTNA), and Firewall as a Service (FWaaS) with Advanced Threat Protection. It fully enforces granular corporate access policies on all applications on-premises and in the cloud, protecting users against threats and preventing sensitive data loss.

Bowles deployed Cato SASE Cloud to locations gradually in high-availability arrays so if a location lost one circuit it wouldn’t lose the service. When it came to integrating BKD, he started with their smaller offices.

He’s also deploying remote access to all 5,400 staff across the merger and finished everything by the middle of summer 2023, working around tax season, when any unnecessary change is frowned upon.

## **Robust Security and Agility for a Growing, Changing Enterprise**

Cato’s security services have been particularly suited to the firm’s needs. “As we grow, our attack surface grows as well,” says Bowles, “and we must protect ourselves from the growing sophistication of attacks.” With Cato SSE 360, there’s no need to worry about keeping up with

security updates, upgrades, and appliance refreshes to scale and tackle the latest threats. He can rely on SSE 360 to handle all that and provide the same robust security to locations, remote users, and cloud access. Cato SSE 360 also helps Forvis address its regulatory issues.

“In addition to the highly regulated accounting industry, we practice in a lot of industries that have their own strict compliance standards,” says Bowles. “They want us to produce SOC 2 and other reports, so we need to know we have the systems, platforms, and controls in place to do so. We also work with a lot more third-party workers in North America and other continents who affect our security posture.”

In all, with its ease of deployment, agility, fast networking, robust security, and consistent set of standards, Cato SASE Cloud has provided Forvis with the ideal solution to address its dual transformation and M&A challenges.

**John Bowles**  
**Chief Information Officer**