



CASE STUDY

Building Confidence and Continuity with the Right IT Partner

When Engage FI faced an unexpected CTO departure, they needed immediate continuity and support. See how Katalyst stepped in to stabilize operations, improve security posture, and protect internal bandwidth.

CLIENT

Engage FI

WORKING TOGETHER

Partnered with Katalyst since 2024

KATALYST'S ROLE

- Co-managed IT support + help desk services
- Microsoft 365 tenant management + advisory support
- Managed detection & response (MDR) using Microsoft Defender
- Security posture improvements, audit remediation, and cloud firewall management

About Engage FI

Engage FI is a consulting firm headquartered in Florida with approximately 100 employees, the majority of whom serve as client technology advisors. The firm specializes in helping banks and credit unions optimize operations across core banking systems, digital banking, payments, vendor strategy, and long-term technology alignment. Engage FI works closely with financial institutions navigating complex technology decisions, often serving as a trusted advisor during moments of transformation.



With a fully remote, Microsoft-centric workforce and a lean internal technology team, Engage FI relies heavily on stable, secure, and well-managed IT operations to support both its consultants and the financial services clients they serve.

Partnership Goal

Engage FI engaged Katalyst to help quickly stabilize IT operations after an unexpected leadership transition, support a lean internal team without disruption, and build a collaborative model that strengthens Engage FI internally while enabling both organizations to better serve credit unions together.

Executive Summary

Engage FI's partnership with Katalyst began during an unexpected moment of transition. When the organization's former CTO departed, Engage FI needed immediate support to maintain business continuity, empower internal resources, and ensure that day-to-day operations continued without interruption.

What started as a rapid-response engagement quickly evolved into a long-term, co-managed partnership built on trust, flexibility, and shared goals. Katalyst stepped in to support frontline IT needs, strengthen the security posture, and provide advisory guidance allowing Engage FI's internal team to focus on higher-level initiatives.

Today, the partnership extends beyond internal operations. With aligned expertise in the credit union market, Engage FI and Katalyst work together to empower financial institutions with the digital backbone, clearer technology strategy, and trusted guidance. What makes the partnership unique is how each organization complements the other. Engage FI advises credit unions on

The Challenge

In late 2024, Engage FI faced a sudden shift when its CTO exited the organization. While the internal systems administrator, Will Berry, had deep institutional knowledge and strong technical skills, the departure created an immediate gap in capacity and leadership support.



“At the time, we had one person handling system administration, security, and help desk responsibilities,” said Damon Sipe, CTO at Engage FI. “For me, one of the biggest risks was having so much responsibility concentrated with a very small team.”

Engage FI’s environment was largely cloud-based, relying heavily on Microsoft 365 and remote collaboration tools. While day-to-day support demands were manageable, the organization needed continuity, risk mitigation, and backups for key applications, especially during employee time off or unexpected issues.

The challenge was not broken technology. It was ensuring stability, security, and sustainability without overburdening internal staff during a critical transition.

The Partnership

Katalyst was brought in quickly to provide immediate operational support alongside Engage FI’s internal team. The priority was ensuring continuity without disrupting the business or overloading existing staff.

The initial focus was on co-managed help desk support and Microsoft tenant administration. This allowed Engage FI’s systems administrator, Will Berry, to step away from constant day-to-day interruptions and focus on higher-value work such as process documentation, infrastructure architecture, and cybersecurity.



“Katalyst has been very collaborative, inquisitive, and willing to lean in,” said Damon. “They asked the right questions and worked with our existing processes rather than forcing something new on the organization.”

Because of the accelerated timeline, onboarding moved quickly. Katalyst integrated into Engage FI’s existing support workflows so end users could continue submitting requests the same way they always had, minimizing friction during the transition.

From the Katalyst side, the partnership is rooted in accountability and advocacy.



“Katalyst really leaned into working with how our users already got support,” Damon explained. “That made the transition much smoother.”

As stability was established, the partnership naturally expanded. Katalyst began supporting managed detection and response by leveraging and optimizing Microsoft Defender, and provides advisory services to help Engage FI address security gaps and audit findings more efficiently.



“One of the most tangible improvements has been the increase in our Microsoft Secure Score,” Damon noted. “It’s a clear KPI that shows the impact Katalyst has helped us make.”

From the Katalyst side, the relationship has remained focused on complementing Engage FI’s internal team rather than replacing it.



“With Engage FI, it’s never been about taking over. It’s about shielding their internal resources from day-to-day noise while staying closely aligned with their goals and priorities,” said Ashley Wallace, Team Lead- Client Success at Katalyst .

Beyond internal operations, the partnership has also been shaped by a shared commitment to serving credit unions more effectively. Both organizations work closely with financial institutions that often face limited IT resources, growing security and audit requirements, and complex technology decisions. Together, the Katalyst and Engage FI help credit unions move beyond reactive technology decisions and toward more stable, well-supported environments.

The Results & Outcomes

Engage FI’s partnership with Katalyst has delivered measurable impact across internal operations, security, and team sustainability. With consistent frontline support and proactive security guidance, Engage FI has been able to reduce risk during a leadership transition, strengthen its technology foundation, and give its internal team more time to focus on strategic priorities. As a result, Engage FI operates with greater continuity, confidence, and flexibility while maintaining a strong experience for employees and the clients they serve.

The partnership between Engage FI and Katalyst has delivered meaningful benefits across operations, security, and team sustainability.

- **Continuity and Coverage:** Katalyst provides consistent frontline support, ensuring Engage FI employees have reliable help even when internal staff are unavailable. This has created true coverage during vacations and holidays, so issues can be resolved without pulling internal resources back in during off-hours or time away.
- **Time Reclaimed for Strategic Work:** By offloading Tier 1 support responsibilities, Engage FI's internal team has been able to shift focus toward higher-value initiatives like security architecture, documentation, and long-term planning. Instead of being interrupted by constant day-to-day requests, the team has more space to work proactively and strengthen the environment.
- **Improved Security Visibility and Confidence:** With proactive MDR, advisory support, and collaboration with security partners, Engage FI is now able to remediate audit findings faster and with greater confidence. The partnership has also helped ensure the organization is prioritizing the right improvements, not just quick fixes, which reduces risk over time and supports a stronger overall security posture.
- **Positive End User Experience:** End user feedback across the organization has become increasingly positive as employees experience faster response times and more consistent support. As more users interact with Katalyst directly and have a smooth experience, it reinforces confidence in the co-managed model and helps reduce friction for the internal team.



“Collaborative, flexible, and valuable,” Damon said. “That’s how I’d describe Katalyst.”

Looking Ahead

As the partnership continues, Engage FI and Katalyst see even more opportunity to deepen collaboration. Internally, the focus remains on reducing day-to-day lift for Engage FI's technology team, creating more time to strengthen security, plan ahead, and scale with confidence.

Externally, both organizations are aligned in supporting credit unions through complex technology decisions. By pairing Engage FI's advisory expertise with Katalyst's infrastructure and cybersecurity support, the partnership helps institutions move beyond reactive fixes and toward secure, well-supported long-term strategies.



“Our clients trust us as advisors, and having a partner we trust to support infrastructure, security, and IT operations is a huge win for credit unions.”

– **Damon Sipe, CTO at Engage FI**

Meet the Team



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Audit pressure and evolving threats require more than quick fixes, they require the right coverage and expertise.



Schedule a call to improve visibility, reduce risk, and move faster with confidence.

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Helping organizations achieve reliable IT operations and cost efficiency through Managed Services, Cybersecurity, and Cloud Solutions.



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