

Built to Recover: How CRC Group Turns Cyber Resilience into a Foundation for Growth with Rubrik

"Rubrik plays a part not only on the data side, but in SaaS, identity, cloud, and AI agents. It all fits together to be a holistic platform that will help us think about moving faster and then having the confidence to say we can rebuild at the speed that we need to."

Howard Whyte
CISO, CRC Group



CHALLENGES

For a global insurance brokerage, protecting customer information is the mission itself. Howard Whyte, Chief Information Security Officer at CRC Group, holds a simple belief about the data his team safeguards: the personal information of CRC's customers deserves the same care as his own. That responsibility carries extra weight in a heavily regulated industry, where CRC must continually prove it meets requirements across identity, data protection, and governance, risk, and compliance.

Howard knows the journey well. He was CISO at Truist when CRC Group, then part of Truist Insurance Holdings, became an independent, privately held company. As an independent business, CRC set out to build and mature its own security program while integrating a number of companies, each with different infrastructure and applications.

In doing so, Howard and his team faced four interconnected challenges:

1 Building An Independent Security Program Under Regulatory Scrutiny:

As a newly independent company, CRC needed to establish and mature its own security posture quickly while continuing to meet regulatory expectations.

2 Sprawling Environments With An Unclear Exposure:

Growth meant bringing together different companies, infrastructure, and applications. If an attacker exploited a privileged account, it was hard to know exactly which data sets were affected.

3 Identity Was An Unprotected Point Of Failure:

For a regulated business, identities had to be backed up and recoverable in a timely manner, with confidence that they could be restored exactly as intended.

4 Recovery Expectations Were Tightening:

Restoring a tier zero application within a day or two was no longer enough as geopolitical and AI-driven threats increased. The goal became hours or minutes, from data the team could trust was free of bad code.

BACKGROUND

CRC Group is the largest independent wholesale specialty insurance distributor in the U.S., founded in 1982 and headquartered in Birmingham, Alabama. With approximately 3,100 employees across five continents, CRC places more than \$30 billion in annual premium and partners with 650+ carriers, serving niche industries including transportation, environmental, construction, and energy.

COMPANY DETAILS

 Insurance

 AMER | Charlotte, NC

OUTCOMES

With Rubrik in place, CRC Group has a cyber resilience foundation that lets it keep growing with confidence:



Regulatory Readiness Backed By Evidence

CRC can show regulators and insurance brokers how far its posture has come, with recovery capabilities that support its risk management framework.



Protected, Recoverable, Identities

Rubrik Identity Recovery backs up CRC's identities and gives the team confidence it can restore them to a known good state.



Faster, Clearer Exposure Assessment Across Acquired Businesses

Rubrik lets the team trace access back to specific data sets to understand the scope of an event, and every new entity brought in through CRC's transformation office adopts the same protection technology stack.



Confidence In Recovery From Known Good Data

Continuous assessment of backup data takes the worry of restoring bad code off the table, and Rubrik and its integrated capabilities are helping bring tier zero recovery times toward manageable tolerances.

TRANSFORMATION WITH RUBRIK

Seamless Deployment, Shared Confidence

As CRC deployed Rubrik for data protection, Howard made identity a priority, having seen the need in other environments. For a regulated business that holds this much sensitive customer information, he considers identity backup and timely recovery essential. Support from Rubrik made the implementation seamless and easy, and the platform now covers CRC's enterprise and unstructured data, its SaaS applications (Microsoft 365 and Salesforce), and its identities in one place.

The value extends well beyond the technology. Howard shares CRC's recovery story with the board and executive team so they know the business can keep operating today and could reconstitute quickly if something happened tomorrow. It also supports how CRC responds to its regulators and insurance partners, showing steady gains in maturity over time. Because resilience is only real when practiced, Howard is now working with Rubrik to exercise recovery capabilities and confirm the deployment matches how top-tier customers run it.

Looking Ahead: Resilience for the Era of AI Agents

Howard sees AI agents as the next big shift: machines that take on identities and act inside the environment like people do. Regulated organizations need to see every prompt, agent, and response, and be able to disable and rebuild an agent just as they would an employee. He sees Rubrik's direction across data, SaaS, identity, and AI agents as a holistic platform that can help CRC move faster with the confidence to rebuild at the speed the business needs.

"The journey to implement Rubrik has been very seamless and easy, because of the support we got from Rubrik."

 **Howard Whyte** | CISO, CRC Group



PRODUCTS & SERVICES



**Enterprise Data
Protection**



**Cloud Unstructured
Data Protection**



**SaaS Data
Protection:
M365, Salesforce**



Rubrik Cloud Vault



Identity Recovery

ABOUT RUBRIK

Rubrik (RBRK), the Security and AI company, operates at the intersection of data protection, cyber resilience and enterprise AI acceleration. The Rubrik Security Cloud platform is designed to deliver robust cyber resilience and recovery including identity resilience to ensure continuous business operations, all on top of secure metadata and data lake. Rubrik's offerings also include Predibase to help further secure and deploy GenAI while delivering exceptional accuracy and efficiency for agentic applications. For more information, please visit www.rubrik.com and follow [@rubrikinc](https://twitter.com/rubrikinc) on X (formerly Twitter) and [Rubrik](https://www.linkedin.com/company/rubrik) on LinkedIn.