

Case Study

Trusted Advisor + Trusted Advisor = Enterprise-Level Wins



OVERVIEW

One of the clearest examples of the trusted-advisor-to-trusted-advisor model in action came through a large healthcare engagement one that perfectly illustrates why collaboration now beats consolidation.

A friendly technology advisor firm had a long-standing relationship with a major healthcare system. The client was sizeable and sophisticated: over 35,000 connected devices across the environment and more than 20,000 employees, operating in a highly regulated, risk-intensive landscape. They were also a heavy Microsoft ecosystem customer, with deep reliance on Microsoft tooling across identity, endpoint, collaboration, and infrastructure.

What they didn't have was the internal capacity or desire to quarterback a full-scale cybersecurity RFP on their own.

That's where Accelerate Partners came in.

THE CHALLENGE

The healthcare system needed to modernize and unify its managed security posture. This wasn't a simple tool replacement or point solution conversation. It required:

- ▶ Executive-level security strategy
- ▶ Deep understanding of healthcare risk and regulatory pressure
- ▶ Experience navigating large MSSPs and complex delivery models
- ▶ An objective, vendor-agnostic procurement process

For the incumbent trusted advisor, attempting to “stretch” into this role would have put both the advisor relationship and the client outcome at risk.

The smarter move? Partner instead of pretending.

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OUR ROLE

Accelerate Partners partnered alongside the trusted advisor as an advanced services and cybersecurity advisory team, effectively operating as:

- ✦ A virtual CISO function
- ✦ A procurement and RFP quarterback
- ✦ An extension of the advisor's organization, not a competitor

We designed and managed a formal cybersecurity RFP process, aligned tightly to the healthcare system's Microsoft-centric environment and operational realities. Our role was not to sell a solution but to ensure the client selected the right long-term partner based on risk, capability, scalability, and delivery maturity.

Throughout the process, the client experienced one unified advisory team. The trusted advisor remained the relationship owner. Accelerate Partners brought depth, structure, and credibility at the executive and security leadership level.

THE OUTCOME

The results spoke for themselves:

- ▶ The healthcare system selected a large, enterprise-grade MSSP
- ▶ The engagement resulted in \$150,000 in new supplier monthly recurring revenue (MRR)
- ▶ The trusted advisor deepened their strategic relevance with the client
- ▶ Accelerate Partners helped close and enable a deal that might otherwise have gone to a PE-backed platform

Most importantly, the healthcare system walked away with a security partner selected through a disciplined, transparent process one they trusted and believed in.

WHY THIS MATTERS

This deal didn't require acquisitions.
It didn't require massive headcount.

It didn't require pretending to be something we weren't.

It required collaboration, trust, and respect for roles.

The trusted advisor stayed trusted. Accelerate Partners did what we do best.

The client won. And together, we competed successfully against much larger, better-capitalized firms.

THE BIGGER LESSON

This is the future of the channel.

Independent advisors don't lose by partnering. They lose by going it alone when the client's needs outrun their internal capabilities.

When trusted advisors team up with other trusted advisors intentionally and transparently they unlock enterprise-level outcomes without sacrificing independence or culture.

And that's a model worth scaling.