

Customer Story

How Carta Accelerated M&A Integration with Island

Reduced employee onboarding from 2 weeks to hours

IT and security no longer slow down M&A

Secure access across unmanaged devices

Full visibility into user activity and AI tool usage

⚡ Impact Summary

Carta transformed M&A integration from a fragmented process into a fast, secure, and scalable workflow. Using Island enabled immediate, controlled access on any device, eliminating Carta's onboarding delays, reducing risk during transition periods, and accelerating time to value across acquisitions.

carta

Equity management and financial infrastructure platform

Industry

Financial Services

Customers

Enterprise security & IT

Team

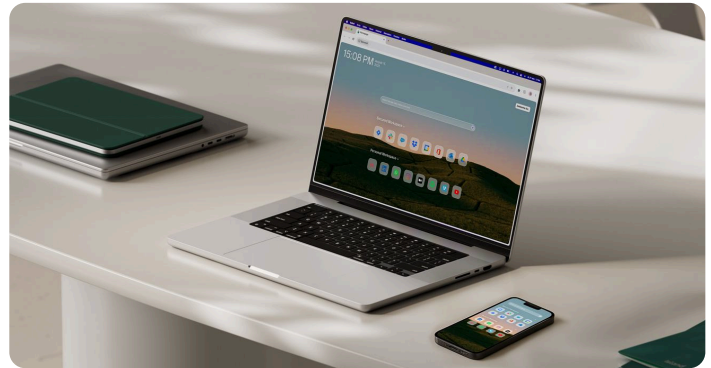
Lean IT organization

Goal

Secure, fast integration during M&A transitions

Use Cases

M&A Integration, Secure Day-One Access, Third-Party & Contractor Access, AI Visibility & Governance, Endpoint Security



Challenges

- ✓ Complex, time-consuming M&A integrations
- ✓ Onboarding new employees and contractors
- ✓ Visibility into unmanaged devices and environments
- ✓ Securing the evolving threat landscape

The Challenge

Carta operates at the center of the startup ecosystem, managing highly sensitive financial data for thousands of companies. That responsibility makes security non-negotiable.

But as the business scales, especially through acquisitions, security and IT face a difficult balancing act: enabling fast integration without introducing risk. Mergers and acquisitions bring inherent complexity, with systems, devices, and teams that must be unified quickly, often under tight timelines.

“There’s always a transition period,” said Umer Shahid, IT Engineer at Carta. “Migrating and integrating the same tools across organizations is a very big challenge.”

Traditionally, onboarding new users required provisioning devices, configuring environments, and ensuring compliance, often leading to weeks-long delays. The impact of these delays is threefold: significantly slowing productivity, increasing risk during transition periods, and pushing out the timeline for realizing value from an acquisition.

At the same time, Carta couldn’t compromise on security.

“If we don’t have full visibility, we don’t have full confidence in the security posture,” said Aldy Cheung, Staff Security Engineer.

With the rise of AI, that visibility has never been more urgent.

“It seems like I can go away for one weekend and come back and the entire threat landscape has changed... especially now in the day and age of AI where it’s accelerating so fast,” said Cheung.

As a result, IT and security risked becoming an M&A bottleneck in a process where speed is critical.

“During the M&A process, IT and security are no longer a bottleneck.”

Aldy Cheung, Staff Security Engineer at Carta

The Solution

Carta deployed Island as a secure enterprise browser to create a consistent, controlled environment across any device—managed or unmanaged.

With Island, Carta can:

- Instantly deploy secure access to any endpoint
- Provide day-one access during M&A transitions
- Enable acquired employees to use existing devices securely
- Maintain full visibility and control, including AI use, without full device management

“During the M&A process, IT and security are no longer a bottleneck,” said Cheung.

The Solution

Island acts as a secure “bridge” during integration. Instead of waiting for full device provisioning, new employees can immediately access Carta systems through a controlled browser environment.

“They can log on from their current machines with our safeguards in place,” Cheung explained.

This creates what Shahid describes as a “security bubble” around enterprise activity, independent of the underlying device.

“And that security bubble provides this peace of mind that our endpoint data and all the data that we have in the cloud is secure,” said Shahid.

“Island provides us a security bubble on any computer that we have.”

Umer Shahid, IT Engineer at Carta

Results

From weeks to hours (or minutes)

Island dramatically reduces onboarding time during acquisitions.

“Instead of waiting two weeks... they can start within hours. And that’s massive,” said Shahid.

In other cases, onboarding dropped from hours to minutes.

IT and security no longer hold up integration

With Island, IT and security enable the business instead of slowing it down. This allows teams to focus on integration and growth, not infrastructure delays.

Secure access on any device

Island allows Carta to extend secure access to unmanaged or third-party devices without risk.

“We can deploy Island to any endpoint and be confident that the data is secure,” said Shahid.

This flexibility is critical during transitional M&A periods, enabling secure access immediately instead of delaying productivity until devices are fully managed.

“Island has given us visibility into all the different types of AI tools that are being used across our organization. And we can use that to standardize our AI strategy.”

Aldy Cheung, Staff Security Engineer at Carta

Results

Faster investigations & full visibility, including AI

Island provides deep visibility into user activity, enabling faster detection and response, reducing time spent on security investigations, and improving overall confidence.

As AI adoption accelerated across the organization, Island gave Carta the ability to see which tools employees were using, how they were using them, and where potential risks were emerging.

“We have the ability to see what AI our users are leveraging and how they’re interacting with it, and generate data to help us apply consistent protections as new tools emerge,” said Cheung. “We can’t protect what we can’t see.”

Enabling Faster, Safer Growth

For Carta, M&A is a critical growth lever, but only if integration happens quickly and securely.

With Island, the company has redefined what’s possible during that transition window:

- Immediate productivity
- Strong security posture
- Full operational visibility

“Island has exceeded my expectations,” said Shahid.

Today, Carta can focus on what matters most: bringing companies, people, and products together faster.

“Island has exceeded my expectations.”

Umer Shahid, IT Engineer at Carta



Ready to simplify access and eliminate VDI complexity?

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