Firstbase
An AppDirect Company

CASE STUDY

HOW PHAIDRA UNIFIED GLOBAL IT ASSET MANAGEMENT WITH FIRSTBASE

Customer: Phaidra
Champion: Holden Whitney, Endpoint Security Manager

Introduction

Global expansion is every company's dream, and every IT team's stress test. For fast-growing organizations like Phaidra, which builds AI-powered systems to optimize complex infrastructure, scaling into multiple regions meant onboarding employees in the United States, India, Europe, and beyond.

However, as the business expanded, IT operations processes that had previously been sustainable were no longer viable at a global scale.

This is the story of how Phaidra moved from fragmented processes to a unified, scalable lifecycle with Firstbase.

The Challenge: Disconnected and Unsustainable Processes

Before Firstbase, Phaidra's IT and Security teams were managing device procurement and deployment using the best options available for each stage of the company's growth.

- **Different solutions by region:** In the U.S., devices were ordered through an online store. Internationally, teams relied on retail locations or other major resellers such as Amazon or Best Buy. Each region had its own approach based on what was most efficient locally and what resources were available at the time.
- **Hands-on coordination across teams:** As Phaidra's global footprint expanded, preparing and shipping devices often meant collaborating with colleagues in other regions—sometimes outside of IT, to handle device setup and delivery. These efforts worked, but they required valuable time and coordination that could have been spent elsewhere.
- **Visibility across systems:** Tracking devices across different tools—like internal wikis, HRIS platforms, and reseller databases, which made it difficult to maintain a single, accurate view of inventory. Finance often had to cross-reference multiple sources to get the information they needed.
- **Enrollment and policy considerations:** For the company's devices, device management rules were tied to the organization's registered country. This created challenges for consistent enrollment and policy enforcement across regions as the company scaled internationally.

Holden summarized the experience simply:

"It was a different process for pretty much every single geo. And frankly, it really wasn't fun to do."

What worked well in Phaidra's early days became increasingly complex as the company grew. Each new region meant more workarounds, more inconsistency, and less confidence in IT's ability to keep pace with business growth.

As Phaidra's global footprint expanded, it became clear that the team needed a more consistent, sustainable foundation for device management—one that could scale with the business instead of adding overhead.

The Turning Point: Searching for a Scalable Model

By late 2023, Holden and his team recognized the need for a more scalable and sustainable model—one that could unify their processes and deliver greater visibility across regions.

They explored several vendors, evaluating solutions that could:

- Standardize device procurement and deployment globally
- Provide a single source of truth for IT and Finance
- Integrate with existing systems like MDM and SSO

Support global enrollment and management policies without regional restrictions

While several vendors offered partial solutions, none could meet the complete set of needs. Firstbase stood out by combining global logistics (procurement, shipping, retrievals) with a software platform for tracking, workflows, and integration—delivering the consistency and visibility Phaidra's teams were looking for.

Firstbase emerged as the clear choice. By combining the physical infrastructure (procurement, shipping, retrievals) with the SaaS control layer (tracking, workflows, integrations), Firstbase promised to deliver the consistency and visibility Phaidra lacked.

Holden recalled the transition:

> *October, November, December was a big shift for us—moving from different processes to exclusively MDM service and Firstbase.*

The Solution: Firstbase as the Global Standard

Phaidra implemented Firstbase across its global footprint, replacing ad hoc regional methods with a consistent model.

Key Capabilities

1. **One unified process across all geos**

   Instead of rethinking workflows every time a new region came online, Firstbase provided a single framework that could be replicated globally.

   "The one unified process is huge."

2. **Consolidated asset visibility**

   All device records now live in Firstbase, giving IT and Finance one reliable system of record. No more reconciling spreadsheets against HRIS and reseller reports.

   "It was between spreadsheets, wikis, and other systems. They all said something different. Now it's all in one place."

3. **Apple Business Manager enrollment**

   Through Firstbase's reseller partnerships, devices were automatically added to ABM. This eliminated the headaches of user-initiated enrollment and reduced the workload for IT.

   "Moving towards ABM enrollment via resellers takes so much admin load off my end."

4. **Identity and security alignment**

   With SSO integrated, IT simplified access while maintaining strong security controls.

5. **Finance empowerment**

   Finance gained direct access to device data. Instead of recurring fire drills asking IT for reports, they could self-serve.

   "Now they almost never ask me where things are because I've shown them how to check."

The Impact: Efficiency, Consistency, and Control

Together, these changes created measurable improvements across both IT efficiency and Finance visibility, allowing the teams to operate with greater speed, confidence, and alignment.

The move to Firstbase delivered measurable improvements across IT and Finance:

- **Time savings:** Each onboarding cycle now saves hours of manual work previously spent packaging devices or reconciling records.
- **Fewer interruptions:** Finance teams reduced requests to IT by learning to access asset data directly.
- **Better employee experience:** New hires now enjoy consistent, reliable onboarding across every geography.
- **Reduced IT burden:** Automatic ABM enrollment and standardized workflows removed repetitive tasks.
- **Stronger scalability:** Phaidra can now expand into new regions without reinventing processes.

Holden highlighted the real value:

> *"Our main value props weren't the ones Firstbase initially pitched. For us, it was the unified process and having all assets in one place. Those have been game-changers."*

Lessons Learned

Phaidra's experience offers valuable lessons for IT and Finance leaders building scalable operations in an increasingly distributed world:

- **Workarounds eventually hit a ceiling.** What works in one region or at a smaller headcount doesn't hold up under global growth.
- **Visibility matters as much as logistics.** Without a single source of truth, IT and Finance spend more time reconciling than executing.
- **Enrollment must be automated.** For Mac environments, ABM enrollment is essential to scalability and security.
- **Empowering Finance reduces IT friction.** When Finance has direct access to data, IT can focus on higher-value priorities.
- **Incremental wins add up.** Even small improvements, like SSO integration, compound to create a smoother, more efficient environment.

Conclusion

For Phaidra, adopting Firstbase was about standardizing and simplifying their global model.

Phaidra's approach to device management evolved alongside its global growth. What began as a collection of region-specific solutions—each one chosen thoughtfully for the company's needs at the time—has matured into a unified, scalable framework that brings IT and Finance even closer together.

With Firstbase, Holden Whitney and his team have built a model that not only streamlines operations but also strengthens visibility and collaboration across departments. Device data is accurate, accessible, and actionable—helping Finance stay audit-ready while enabling IT to focus on strategic priorities.

"It's been a tremendous help—for me, for Finance, for everybody."

As more organizations scale internationally, Phaidra's story highlights what's possible when operational maturity meets the right technology partner: consistent experiences for employees, confidence for Finance, and a foundation that grows with the business.