

NexusTek provides the company a co-managed IT relationship that gives their in-house technology leaders control over IT strategy, while NexusTek takes care of time-consuming projects and infrastructure management.

Overview

Location: Western U.S.

Company Size: 200+ employees

Type: Privately held

Industry: Finance

Customer Profile:

This customer is a residential mortgage lender that prides itself on integrity and trust in relationships with borrowers, offering timely and accurate loan service due to their operational expertise and cutting-edge technology.

Solution Benefits:

- Deployed Microsoft 365 across all locations to support communication and collaboration.
- Strengthened protection against phishing and other forms of social engineering attacks.
- Improved IT performance and security by refreshing servers and other outdated hardware.

Business Need

This company was formed 10 years ago with a mission to place integrity at the core of their mortgage lending services. The new business grew quickly, creating a need for efficient scaling of their IT to keep up with their rapid expansion. Although the company had executive-level IT expertise in-house, they did not have sufficient IT staffing to deploy new systems and manage existing infrastructure as the business continued to grow and expand.

With an intense focus on their mortgage lending customers' needs, the company did not have the bandwidth to recruit and manage a full IT team internally. The company needed to outsource, but because they possessed internal IT leadership, they wanted to develop a co-managed IT relationship that would give them control over strategic IT planning, while outsourcing new projects, cybersecurity, and the time-consuming day-to-day management of their infrastructure.

In addition to day-to-day IT support, the company was operating with legacy infrastructure that was due for updates. For one, they were relying upon an outdated, tape-based backup service to support their disaster recovery needs. Various hardware components such as servers were aging and in need of updates as well.

Solution

NexusTek assisted the customer to update its infrastructure, replacing outdated servers and other hardware components such as employee laptops. As the company has expanded into new locations, NexusTek has assisted with setting up servers and networking, and integrating the new environments into the larger infrastructure. In addition, Microsoft 365 was deployed across all branches as well as their corporate office, and NexusTek manages the licensing.

Selected cybersecurity solutions were implemented to protect the company's infrastructure and data, including Microsoft Azure Active Directory (AD). An email protection solution was implemented, as well as employee security awareness training. NexusTek also helped the company to modernize its data backup system, implementing an advanced disaster recovery solution.

To keep their IT infrastructure running reliably, the company chose NexusTek's Complete IT Services plan, with a dedicated onsite engineer on a full-time basis. The company also strengthened its strategic technology leadership capabilities by adding 8 hours per month of NexusTek's vCIO services.

Solution Benefits Continued:

- Protected against data loss or destruction in the event of disaster or cyberattack.
- Implemented full-time IT management with onsite, dedicated engineer.
- Provided 24/7/365 help desk support to keep employees' IT up and running.
- Monthly vCIO consultation for consistent, executive-level technology leadership.

Results

This customer now has a productive and collaborative co-managed IT relationship with NexusTek, which gives them the expertise and onsite engineer hours they need to implement and manage an infrastructure that adheres to their strategic vision. Deployment of Microsoft 365 allows finance professionals to communicate and collaborate across their variety of branch locations. In addition, NexusTek's management of Microsoft licensing takes a tedious task off the company's shoulders.

With the assistance of NexusTek's engineers, the company was able to update its hardware, avoiding the security risks and productivity drags that are associated with the use of outdated IT equipment. Now that the company has access to a full-time dedicated engineer, plus a 24/7/365 help desk, branch and corporate office employees can obtain assistance to resolve technology issues that could otherwise impact their ability to serve mortgage borrowers.

As a mortgage lender, keeping borrowers' personal and financial data secure is of the utmost importance. NexusTek assisted the company to stay true to its promise of integrity to customers by strengthening their security posture, with email filtering and employee awareness training to bolster their defenses against the most common types of cyber threats.

With Azure AD, the company can exert more control over who gets into their networks, making sure unauthorized parties are blocked from gaining access to borrower financial records and other sensitive data in their systems. In addition, the company is now empowered to control which portions of their data every user can access, restricting access to the most sensitive company, borrower, or employee data to just those employees who need it.

When their internal IT leader needs a second set of eyes on executive-level IT matters, they can rely on NexusTek's vCIO to offer an informed perspective and consultation. For example, when developing IT policy related to high-risk areas like email retention periods, the company's IT leader has turned to NexusTek's vCIO for guidance on current best practices. Their IT leader has also been able to draw upon the expertise of NexusTek's vCIO to develop security policies, which are essential for managing the considerable cyber risks experienced in the financial industry.

Finally, because all of NexusTek's services and solutions scale easily, the company can move ahead with new acquisitions and expansions knowing that its IT infrastructure will be deployed consistently in new branches. They can also rest assured that new branches' infrastructure will integrate seamlessly into their existing network, allowing mortgage lending business to proceed smoothly across all branch and office locations.

This case study was prepared with the customer's full knowledge and involvement. To respect the customer's privacy, we have omitted their name, logo, and any other identifying information.