

Modernizing IT Operations for a Growing Mortgage Lender

A growing residential mortgage lender experienced rapid expansion but lacked adequate IT resources to effectively manage daily operations, deploy new systems, and scale efficiently. Aging infrastructure—including outdated servers and a legacy tape-based backup system—further strained performance and security. To stay focused on customers and compliance, the company turned to a co-managed IT model for strategic oversight with outsourced execution and support.

Modernizing IT operations for secure, compliant lending

To support the lender's rapid expansion, NexusTek delivered a co-managed IT solution that combined internal oversight with hands-on external expertise and operational support. A complete infrastructure refresh replaced outdated servers, laptops, and backup systems. Microsoft 365 was deployed across all locations to streamline communication and collaboration, with NexusTek managing licensing and updates.

Cybersecurity protections were elevated, including the implementation of Microsoft Azure Active Directory (AD), advanced email filtering, and employee training. Dedicated onsite engineers also provided responsive support, while monthly virtual CIO (vCIO) sessions guided IT policy, compliance planning, and long-term investment decisions.

Strengthening infrastructure to support financial growth

With modern infrastructure and operational support in place, the company now runs with greater stability, resilience, and security. Microsoft 365 and refreshed hardware keep teams connected and productive across branches, while updated defenses reduce exposure to cyber threats. Strategic input from NexusTek's vCIO also empowers internal leaders to advance modernization initiatives and make informed, future-ready decisions. Now, the business is positioned to grow—whether through new branches, acquisitions, or other strategic opportunities—without added complexity or disruption.

[Learn more at nexustek.com.](https://nexustek.com)



■ Challenges

- Limited internal IT staff to manage growing infrastructure
- Aging hardware and outdated disaster recovery tools
- Rising cybersecurity and compliance demands

■ Services

- Co-Managed IT, Cybersecurity, Disaster Recovery, Microsoft 365, Strategic vCIO Consulting

■ Outcomes

- Refreshed infrastructure including servers and laptops
- Improved protection against cyber threats and data loss
- Reliable engineering support with 24/7 help desk coverage
- Strategic IT planning and risk mitigation guided by vCIO

■ About the customer

- A 200+ employee, U.S. mortgage lender serving residential borrowers focused on operational expertise and leading-edge technology