MORTGAGE WORKSPACE
A division of Access Business Technologies

MASONMAC

How Mason-McDuffie Mortgage's Microsoft Secure Score skyrocketed **from 32% to nearly 93%**

Situation

Mason-McDuffie Mortgage (MasonMac), a prominent retail mortgage banking firm headquartered in the San Francisco Bay Area, operates across approximately 40 states with a workforce of around 350 employees. The company faced a unique set of growth-related challenges that were made worse by the widespread impact of the COVID-19 pandemic, which fundamentally altered MasonMac's operational dynamics.

"After the pandemic, our workforce became now more widely distributed," said Chuck Iverson, president and CEO. "We've also grown rapidly, so we have employees all over the country working out of their houses or small offices."

This geographically dispersed workforce necessitated a robust, secure, and efficient IT infrastructure, which is especially crucial in an industry handling sensitive consumer data. A traditional IT setup that relies on physical servers and a less centralized approach was no longer viable for MasonMac's evolving business model.

"It became increasingly important for us to be able to equip our employees to do their jobs efficiently, but also securely," said Chuck.

The company's challenges were multifaceted. First, the distributed nature of the workforce demanded a more agile and accessible IT infrastructure. Second, the mortgage industry's intrinsic requirement for high-level data security meant that any IT solution had to be foolproof against rising cyber threats. Third, the urgency brought on by coordinating software licenses pressed MasonMac to seek a swift yet effective solution.

The company's existing IT setup further complicated matters. As explained by Clinton Weyland, vice president of IT, the company's initial cloud integration efforts were partial and lacked cohesion.

"We had lots of laptops and desktops with multiple different security software on them," said Clinton. "The company's IT infrastructure included a mix of Microsoft Office services and various security software, and we lacked a comprehensive strategy to transition to the cloud fully.

MasonMac was at a critical juncture. It required a strategic overhaul of its IT infrastructure to meet the demands of a rapidly changing work environment, heightened cybersecurity needs, and the challenges of managing a distributed workforce in the sensitive mortgage banking sector. Chuck and Clinton knew they needed help. After a search, they found Mortgage Workspace®, the mortgage dedicated division of Access Business Technologies (ABT).

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> Thanks to ABT's assistance with our mortgage industry digital transformation, it is much easier for us to deploy and service our employee's laptop and desktop needs, and do it in a secure environment.
>
> **Chuck Iverson**
> *President and CEO, Mason-McDuffie Mortgage*

Solution

To tackle its intricate IT challenges, MasonMac engaged ABT as a strategic partner. Known for being the largest dedicated Tier 1 Microsoft Cloud Solutions Provider (CSP) serving the mortgage industry vertical, ABT devised an all-encompassing solution centered on two pivotal elements: Microsoft 365 Guardian™ and Microsoft 365 Guardian™ Managed Extended Detection and Response (MxDR) service.

This approach combined ABT's specialized expertise in Microsoft cloud technologies with its tailored understanding of the unique needs of the mortgage industry. The M365 Guardian Suite™ offered a robust, multifaceted cybersecurity framework, addressing key areas from device management to data protection. Meanwhile, the M365 Guardian MxDR service provided ongoing monitoring, detection, and response support, ensuring MasonMac's IT environment remained secure, efficient, and compliant with industry standards. This comprehensive strategy was designed to both fortify MasonMac's IT infrastructure and streamline its operations, making it a cost-effective and reliable solution for the company's business needs.

The M365 Guardian™ phase of the solution was meticulously tailored to exploit the full range of Microsoft 365's security features, aligning perfectly with MasonMac's specific requirements. The suite encompassed four major areas: identity and access management, threat protection, information protection, and security management and applications.

> The M365 Guardian Suite offered MasonMac a robust, multifaceted cybersecurity framework.

Identity and Access Management

ABT established robust identity and access management protocols by implementing Microsoft Entra ID (formerly Azure Active Directory) and Microsoft Intune. This was vital for managing MasonMac's distributed workforce and ensuring secure access to sensitive data and resources. Microsoft Intune, part of Microsoft's Enterprise Mobility + Security suite, was particularly pivotal in managing and securing a variety of devices, such as computers and mobile phones, and enforcing compliance and security policies across the board.

Threat Protection

Advanced Threat Protection via Microsoft Defender for Office 365 was a cornerstone of the strategy. This feature was critical in defending MasonMac against sophisticated cyber threats, which is particularly important in the financial sector where the handling of sensitive data is a constant.

Information Protection

ABT integrated Microsoft Information Protection and Compliance to safeguard MasonMac's consumer data. These tools were instrumental in enhancing the security of information flows within the organization, ensuring data integrity, and preventing unauthorized access or data breaches.

Security Management and Applications

This area included the provision of essential Microsoft 365 licensing, equipping MasonMac with advanced productivity software like Microsoft Teams, SharePoint Online, and OneDrive for Business. Integrated with security management tools such as Microsoft Secure Score and Microsoft Compliance Manager, this approach facilitated comprehensive management of the company's cybersecurity posture and compliance.

Solution *(continued)*

By encompassing these four major areas, ABT's M365 Guardian Suite offered MasonMac a comprehensive and robust cybersecurity solution. It adeptly addressed a wide range of security needs, from effective device management to stringent data protection, ensuring a secure, efficient, and compliant operational environment. Simultaneously, the suite provided all the necessary Microsoft productivity software, facilitating cost-effective operations for a mortgage company. This holistic approach not only fortified MasonMac's cybersecurity infrastructure but also equipped them with the advanced tools required for seamless business operations.

Clinton underscored the transition from a traditional IT setup to a more centralized, cloud-based approach. "This shift not only enhanced security but also simplified the management of applications and user access," said Clinton. "That addressed the core issue of efficiently supporting a distributed workforce."

The introduction of M365 Guardian MxDR service included continuous monitoring and threat detection, incident response, AI-driven analytics, and security policy coverage.

Continuous Monitoring and Threat Detection

ABT established ongoing surveillance of MasonMac's IT systems, enabling early detection of potential security threats.

Incident Response

In the event of a security breach, the MxDR service provided rapid response capabilities, minimizing potential damage and ensuring business continuity.

AI-Driven Analytics

By leveraging advanced AI technology, ABT was able to proactively identify and mitigate threats and stay ahead of evolving cyber risks.

Security Policy Coverage

ABT used MasonMac's Microsoft Secure Score to review the company's security posture, then improved that posture by helping MasonMac monitor, implement, and update critical security policies.

ABT's solution was not just about integrating new technologies. It also involved a strategic overhaul of MasonMac's existing IT infrastructure. The approach was holistic, addressing both immediate security concerns and long-term operational efficiency. ABT worked closely with MasonMac's IT team, ensuring a seamless transition to the new systems with minimal disruption to daily operations. This collaborative effort was crucial in customizing the solution to meet the specific needs and challenges faced by MasonMac.

Throughout the implementation process, ABT and MasonMac maintained regular and structured communication, which Clinton described as "vital for addressing any challenges that arose during the transition."

"The constant communication allowed for proactive cyber threat defense and ensured that the project stayed on track," said Clinton. "This level of ongoing support and guidance from ABT was instrumental in the successful deployment of the solution."

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ABT's expertise, reliability, and deep knowledge of the mortgage space positioned MasonMac as a leader in the mortgage industry.

Results

Enhanced Cybersecurity Posture

MasonMac's Microsoft 365 Secure Score improved substantially from a concerning 32 percent to more than 90 percent, indicating a robust defense mechanism against potential cyber threats.
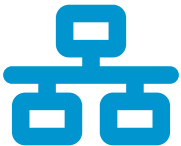
Modernized IT Infrastructure

The ABT-facilitated transition to cloud-based services led to more efficient IT operations, simplifying the deployment and servicing of employee desktop needs.

Improved Compliance and Security Standards

The elevated Secure Score signifies compliance with best cybersecurity practices, which is crucial for a company handling sensitive financial data.

Increased Stakeholder Confidence

The cybersecurity improvement boosted MasonMac's stakeholders' confidence in the safety and integrity of their data and systems.

Created a Strategic Business Advantage

According to Chuck, ABT's "expertise, reliability, and deep knowledge of the mortgage space" positioned MasonMac as a leader in the mortgage industry, equipped to handle evolving cyber threats while maintaining operational efficiency.