

Modernising and Securing IT for a Fast-Growing Mortgage Brokerage



mortgage^{1st}

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Client

Fast-growing UK mortgage brokerage

Sector

Financial Services

Locations

Nationwide

Core Services

Cloud Hosted Desktop
+ M365 Security +
Structured
Onboarding & Support

Overview

Mortgage 1st is a UK mortgage brokerage supporting a nationwide adviser network and central operations team. As the business scaled, it required a more secure, professional IT environment aligned with financial services compliance. Netprotocol delivered a cloud-hosted desktop platform and enhanced security, creating a stable, scalable foundation for a mobile workforce and future growth.

The Challenge

As the business grew and began preparing for acquisitions, its IT setup was no longer suited to the increasing demands of a regulated financial services environment.

The organisation needed to:

- Strengthen data security & compliance for sensitive financial information
- Deliver a consistent, professional user experience for advisers
- Support fast onboarding & scalable growth
- Introduce structure and standardisation across all devices and systems

The Solution

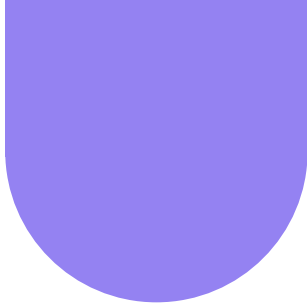
Mortgage 1st partnered with Netprotocol to modernise its IT systems, implementing:

- A centralised Citrix platform to deliver secure, stable access for advisers across the UK
- Enhanced Microsoft 365 security controls, including MFA and improved access management
- A structured onboarding and offboarding process, enabling consistent device setup and rapid user provisioning

- Unified data management and security policies aligned with financial services expectations
- Ongoing advisory support to inform infrastructure planning, security posture, and acquisition integration

This phased transformation provided a secure, scalable platform capable of supporting both remote advisers and office-based teams.

Transforming Mortgage Brokerage IT with Cloud Hosted Desktop and Netprotocol



Why Cloud Hosted Desktop?

As the organisation scaled rapidly, supporting a nationwide, mobile adviser workforce with consistency, security and availability became critical. A cloud-hosted desktop model provides a single, controlled environment that advisers can access securely from anywhere, without relying on local device configurations.

This approach delivers:

- Secure, centralised access to systems and data
- Consistent user experience across all advisers and teams
- Improved resilience and 24x7 availability
- Simplified onboarding as the business scales
- Strong alignment with financial services security and compliance expectations

By moving to a cloud-hosted desktop platform, Mortgage 1st gained the flexibility of remote working without compromising control, security or performance.

The Role of Netprotocol

As Mortgage 1st's long-term technology partner, Netprotocol provides ongoing guidance and hands-on support across the business.

This includes:

- Aligning IT strategy with Mortgage 1st's commercial and growth objectives
- Regular security updates and proactive recommendations
- Technical assessments and planning support during acquisitions
- Continuous refinement and evolution of systems as the business scales and requirements change
- A collaborative relationship built on transparency, trust and shared goals

This partnership has enabled Mortgage 1st to move to a professional, enterprise-grade IT model.

Results



Stable, secure IT environment across all teams



Faster, streamlined onboarding within 24-48 hours



Enhanced security posture aligned with financial services compliance



Scalable platform prepared for acquisitions and rapid adviser growth



24x7 continuous, secure system access for advisers and internal teams

