

Case Study

Financial Services: RIM BlackBerry



Financial Services Giant Improves Asset Allocation with XcelleNet Solution

EXECUTIVE SUMMARY

About the Company

As a leading, global full-service financial services company, this company provides investment banking, brokerage and asset management services to corporations, governments and individuals worldwide.

Business Pain

With a user population numbering over 25,000 worldwide, the IT management had a bear of a time controlling hardware and software inventory. They managed the control of their laptops and desktops, but when they decided to deploy thousands of RIM BlackBerry devices, they realized they needed advanced technology in order to protect corporate security and to perform device inventory control.

The Value of the XcelleNet Solution

After investing in the XcelleNet mobile infrastructure solution, this client secured their ability to track the devices and the software contained on them. They also bolstered their proactive helpdesk assistance to busy BlackBerry users and insured compliance with company security policy by automating inventory control messaging to end-users.

Headquartered in the northeast United States, this client is a leading, global financial services company that provides investment banking, brokerage and asset management services to corporations, governments and individuals worldwide.

While this financial giant is organized into divisions, including Securities and Retail Brokerage Services, their IT functions are centralized. Software and hardware projects are instituted company-wide across the different divisions.

Challenges Related to Diversifying Their Holdings

In an industry where investing and managing other people's wealth is the main order of business, internal accounting practices are viewed as essential. Accounting for electronic devices and the software contained on them is not taken lightly. Likewise corporate security and company privacy are paramount. For years their IT experts have written their own coding to protect proprietary information and provide help to their end-users—an army of brokers and bankers whose time is money.

In an effort to maximize productivity, the company decided to deploy handheld devices that would allow users to check e-mail without the bulk of a laptop. They decided to deploy thousands of RIM BlackBerry handheld devices to employees across the entire company. Because they're headquartered in a large city, many employees endure lengthy commutes. These devices would allow their workers to access and respond to e-mail during what might otherwise be unproductive time.

There was a challenge facing this client for the BlackBerry deployment. "We knew that once we deployed the handhelds we wouldn't see them again. Without some sort of solution, I knew I'd have no ability to pull information from the devices," says a high-ranking IT manager from the client company.

They needed a way to account for the devices, measure user compliance and most importantly, to guarantee that their corporate security policies and

procedures wouldn't be compromised when the new devices were deployed.

Strategic Investments

"I had been involved in remote access a long time and always knew of XcelleNet's products," says a systems manager.

"Fortunately, prior to deploying the BlackBerry handhelds, a representative from XcelleNet called and we started discussing the deployment project. When I told him that we needed the devices to talk back to us, he explained that the XcelleNet solution could solve that very problem."

Preventing and Offsetting Losses

In an industry where information is money and mishandled data can lead to lawsuits, this client knew they needed to safeguard the information on the BlackBerry handhelds. XcelleNet's mobile infrastructure solution provided them with the tools they needed to insure the safety of proprietary information, even if a device were lost or stolen.

As soon as a user reported a lost device, the IT experts within the company were able to automatically instruct the device to scan. The XcelleNet software enables clients to lock down a lost device, and can delete sensitive data behind the scenes. The client can also program the software to place a customized notification on the screen, for example, stating that device has been lost, asking for its return and offering a reward. This also allows the IT team to pinpoint where a misplaced device is, allowing them to relay its location to the user.

"Even when a device was out of coverage, the XcelleNet software gave us the audit trail to ensure that the device was password protected and was using the IT policies we deployed the device with," says one system manager. "About half the time, the lost device had simply been misplaced. I can't tell you how many times the device would answer us from Anytown, USA and the end-user would say, "Oh, my brother lives there. I must have left it when I visited.""

XCELLENET™

"The XcelleNet solution allowed us to assess and control risk, and therefore pass our audits. It enabled us to put controls in place to make sure our processes and procedures and corporate guidelines were being adhered to. I could sleep at night. It's a great product."

Accounting for Corporate Costs

At this major financial services company, executives keep careful watch to make sure they're investing their IT dollars wisely when implementing new devices. The BlackBerry deployment was no exception. Executives wanted to ensure that the devices weren't just collecting dust. That's why IT management chose to install the XcelleNet solution onto each and every BlackBerry they deployed.

The software from XcelleNet monitored device use and provided reliable reporting. System administrators knew precisely which devices were in use and which ones had never been turned on. This information enabled them to advise business management which devices were underutilized and could therefore be re-assigned.

"When an executive came to me and asked, 'Is everyone using this device?' I had to give them a definitive answer. In a company of several thousand people, this wasn't exactly easy to do. But with XcelleNet's solution, I had the data. I had the information to know for sure whether or not end-users were using the device," says a systems manager.

Continuing Proactive Guidance

Internal IT customers at this client company were accustomed to a high level of IT support. With the deployment of the new devices, the IT management wanted to insure the same high level of support. XcelleNet's solution more than met their expectations.

Querying individual devices and determining information about each one was no problem. They were able to track important details such as which operating system was running, which BlackBerry model each user had, and how much free memory remained.

"If we wanted to put a third party application on the devices, we could look at the amount of free memory on each device," says a systems manager. "I could also see how many messages a user had and how many unread messages he or she had."

They were able to put scripts in place to notify users if they had too many saved messages and advise them of the best way to delete those memory-hogging messages. Furthermore, they could write scripts to determine whether an individual user was resetting his or her device due to operating problems. The information allowed them to offer proactive help to their users.

"Our proactive approach created a positive perception because we contacted the end-user before he had to contact us," says a systems manager.

Harnessing a Wealth of Information

Another benefit this client realized with the use of the XcelleNet solution was the elimination of unacceptable delays due to overloaded cellular towers. Let's face it—wireless devices can't increase communication speed and efficiency if the signals are weak or unavailable.

The client's service level agreement with their wireless provider guaranteed a minimum response time. But the client knew that e-mail messages were being delayed. With the data from the XcelleNet solution, they were able to pinpoint the problem and go to their cellular provider with the data to get results.

"In most office environments, at 10:30 am, you are where you're normally going to be most of the time," says a systems manager. "So, at that time, we would send a scan notice to the entire BlackBerry population. As a result, we knew where all the devices were and which towers they were talking to. It was reassuring to know that we could identify people or areas of the firm, or certain office locations that might have poor coverage."

Eliminating Unnecessary Expenditures

The company couldn't afford to have uncertified software threatening the integrity of the devices and potentially compromising

corporate security. XcelleNet's solution helped them identify the threat and put measures in place to apply their corporate security measures to decrease the risks.

"The XcelleNet solution let me know which applications were on the devices—when someone downloaded a game I would find out about it," says a systems manager. He could easily take the necessary steps to work with the user to delete the unapproved software.

Bullish Effects from XcelleNet's Solution

Overall, the XcelleNet solution provided this client with all of the benefits they were looking for prior to deployment and some added benefits that they discovered after the devices were in the field. The solution gave them the security they desired and an added peace of mind knowing they were increasing worker productivity without compromising corporate security.

"The XcelleNet solution gave us a wealth of information—information that we couldn't get unless we worked to obtain it manually," says a systems manager. "Our company, like most, is concerned about risk and periodically schedules internal audits. The XcelleNet solution allowed us to assess and control risk, and therefore pass our audits. It enabled us to put controls in place to make sure our processes and procedures and corporate guidelines were being adhered to. I could sleep at night. It's a great product."