

Case Study: RoadSync for Symbian UIQ



Key Benefits:

- Push e-mail delivers real-time business communications and data for on-the-go investment managers and C-level executives
- Improved responsiveness results in overall improvement of customer service
- One-to-one calendar synchronization allowing for better scheduling during business travel
- Utilization of Exchange Server 2003 for mobile e-mail deployment allows for low-impact on IT budget and resources
- Reduced corporate overhead for mobile email that eliminates middleware servers and recurring service fees
- Eliminates need to carry three devices, namely *mobile phone + PDA + laptop*

About GIMV n.v.

GIMV is a Belgian investment company that was established in 1980, and since 1997, has been quoted on Euronext Brussels. Its purpose is to invest in the equity of unlisted companies (private equity) across the globe. Growth is in the forefront for GIMV because this increases the value of its shareholdings, generates profits when these interests are sold and, as a consequence, provides the resources for new investments. To reinforce this growth, GIMV contributes knowledge and experience through the board of directors in addition to its capital investment. GIMV operates in three areas. GIMV's venture capital is invested primarily through its ICT and Life Sciences divisions. In more traditional industries, it also undertakes management buy-outs and provides growth capital through its Corporate Investment division. The portfolio maintains a balance among start-up companies, fast growth companies and major enterprises. In this way, GIMV positions itself as a player in the international market.

RoadSync Pushes E-mail, Calendar and Contacts Data to GIMV Investment Managers and Company Executives for Improved Client Relations

GIMV selected DataViz' RoadSync for its corporate push e-mail solution, enabling the further utilization of its Exchange Server 2003 investment through the use of Exchange ActiveSync. With RoadSync, secure, wireless direct push synchronization of Microsoft Exchange data is available for GIMV's investment managers and executives using Sony Ericsson P900 and P910 smartphones. Having e-mail, calendar and contact data automatically delivered to their smartphone while on the go has become an indispensable tool for GIMV's mobile workers who spend 60-75% of their time out of the office. Overall benefits with RoadSync range from customer service improvements and better communication with clients and colleagues during business travel to lowered IT resources and overhead required to deploy and support mobility.

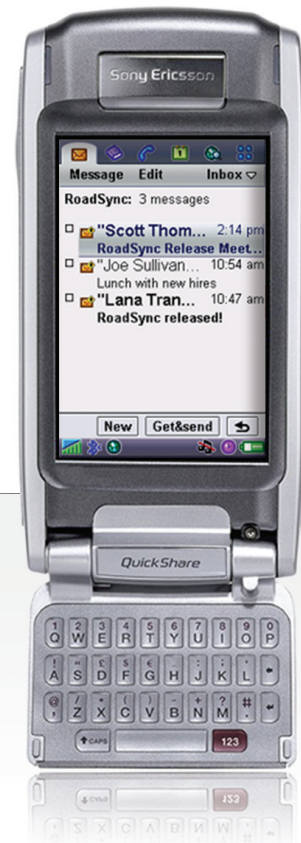
The Challenge

GIMV has always trusted Microsoft-based platforms and solutions to provide the necessary tools to support its mission of maintaining prominence in the international investment community. For years, the company has relied on a number of Microsoft based solutions including Exchange Server and Microsoft Outlook for its messaging and collaboration needs and Microsoft Office, especially Excel, in its day-to-day business dealings. For members of its investment team requiring mobility, Pocket PC devices were issued so that users could synchronize their Outlook information from the desktop to their PDA.

Nineteen of GIMV's investment managers and executives (30% of the company) regularly travel for business or work from home offices. Given the frequency of their time out of the office, requests for wireless and mobile access to Outlook e-mail grew dramatically. At the same time, company executives wanted to update their mobile phones for improved voice-quality. As a result, the IT Manager began to explore convergence devices that would provide a combination of high-quality voice capabilities along with data functionality for access to Exchange e-mail and the internet.

A number of mobile devices were considered, including the Pocket PC PDAs already in use, Blackberry devices along with Sony Ericsson P900 and P910 smartphones. The usage experience of the Pocket PC devices was adequate; however this 'tethered' solution still required users to carry a mobile phone, the PDA along with a laptop. The Blackberry device and corresponding e-mail solution was not preferred by GIMV's IT Manager because of stability concerns of having the required Blackberry Enterprise Server (BES) connected to its in-house Exchange Server. In addition, GIMV had concerns about the voice-quality of the Blackberry devices. The Sony Ericsson P900 and P910 smartphones, given their converged form-factor, high-quality voice capabilities, various text-entry methods, such as the QWERTY keyboard on the P910, touch screen and push e-mail support matched well with GIMV's requirements.

GIMV procured 19 Sony Ericsson P900 and P910 devices for investment managers in all 3 areas of the business who spend 60-75% of their time out of the office along with the CEO, CIO, CFO and CLO. For access to e-mail and PIM data from Exchange, a syncML solution was initially selected; however, users were dissatisfied with its functionality. Neither push e-mail nor scheduled synchronization was supported. Users had to manually initiate synchronization with Outlook to send and receive new e-mail and PIM data. In addition, users found the Outlook calendar synchronization unreliable. If an appointment was moved on the mobile device, this was not reflected on the server and in Outlook. Therefore, users had to make note of these updates in order to reconcile Outlook manually after the fact once they had access to their laptops when on the road or back at the office. On account of the users' frustrations with the syncML solution, the IT Manager sought to deploy a push e-mail solution that also supported one-to-one calendar and contact synchronization and that would have low-impact on its IT servers and resources.



The Solution

Sony Ericsson P900 and P910 Smartphones

Microsoft Exchange Server with Exchange ActiveSync

RoadSync for UIQ

Given the positive experiences with Microsoft-based solutions, IT & Facilities Manager, Dave Cremers of GIMV, felt the new mobility features in Service Pack 2 (SP2) for Exchange Server 2003 made Exchange ActiveSync a viable option. RoadSync from DataViz, Inc. was available to provide this functionality for its chosen Sony Ericsson P910 and P900 smartphones. Based on Exchange ActiveSync technology licensed directly from Microsoft, RoadSync provides secure, wireless and direct push synchronization of corporate Outlook e-mail, calendar, contacts and attachments to Symbian OS and other mobile devices, including the P900 and P910 smartphones.

RoadSync's features and functionality benefit not only the end-users but also GIMV's IT Department. For GIMV's investment team and executives, RoadSync provides a reliable and robust push e-mail and PIM synchronization solution. New e-mail messages along with calendar and contacts updates automatically arrive to the P910/P900 smartphones without requiring users to manually initiate communication with the server. Changes and actions taken on the smartphone such as composing and sending an e-mail message or updating a calendar item are automatically reflected on the Exchange Server so that the next time a user logs into Outlook, the sent message can be found in the user's Sent Items folder and their calendar is up-to-date.

"With push delivery of new e-mail messages, our investment managers and executives are able to keep the lines of communication open and stay in touch with the office and clients no matter where they are. In addition, the one-to-one calendar synchronization has allowed the team to spend less time managing and reconciling their Outlook data and more time managing client relationships,"
Cremers said.

For the IT department, RoadSync, through its utilization of Exchange ActiveSync, has allowed GIMV to leverage its existing Exchange Server 2003 investment to extend mobile messaging capabilities to its investment managers and executives. Cremers prefers to limit the reliance on solutions that touch its Exchange Server 2003 and corporate network, so standardizing on Exchange ActiveSync was ideal since there was no need for additional middleware servers in order for users to directly access their corporate mailboxes. Additionally, since Exchange ActiveSync does not rely on a network operations center (NOC) for the delivery of mobile e-mail, the 'no middleware' RoadSync is a very cost-effective push e-mail solution for GIMV's current and future deployments

"Through the use of Exchange ActiveSync and RoadSync, we're able to streamline our IT costs and eliminate recurring service fees that would have been required with a solution like Blackberry,"
Cremers noted.

“Push delivery of new e-mail messages using RoadSync allows our investment managers and executives to immediately respond to changes in business deals and provide better service to our clients...In addition, the ROI of using Roadsync for our company has been huge compared to implementing Blackberry.”

Dave Cremers
IT & Facilities Manager
GIMV n.v.

Deployment, Training and Maintenance

Using the mobility configuration and management tools integrated into Microsoft Exchange Server 2003, the deployment of RoadSync was very straightforward for GIMV. In order to take advantage of the new push e-mail and security features, the IT department first updated its Exchange Server 2003 with SP2. After this quick half-hour installation (including reboot), the managers and executives were able to immediately utilize Direct Push to retrieve and send e-mails, access contact lists, including the company's Global Address List, and update calendar data using their Sony Ericsson P900 and P910 smartphones. All in all, a successful deployment was achieved after the following tasks were completed:

- 1. Exchange administrator (in this case GIMV's IT & Facility Director) selected options in the Exchange System Manager to enable mobility for each user.**
- 2. The RoadSync client application was installed on each user's smartphone.**
- 3. Once the installation of RoadSync was complete, the Exchange administrator configured the application with the proper server settings and unique log-in details per user.**

When the Sony Ericsson smartphones were initially deployed, Cremers ran a two-hour device training for the 19 users. Because RoadSync seamlessly integrates with many core features and applications native to the Sony Ericsson devices, the required training for RoadSync's deployment was minimal. In order to keep the learning curve low, RoadSync populates the built-in calendar and contacts database with Exchange Server data and uses a separate mailbox within the main messaging application to deliver and manage Exchange e-mail on the device. In addition, RoadSync requires the same domain log-in credentials that users are accustomed to from their laptop or desktop. In keeping with GIMV's group policies, users are required to reset this password after a predetermined time period. Upon doing this, they must also update their password used in RoadSync. In addition, in the event the device is lost, stolen or misplaced, Cremers can use the Microsoft Exchange 2003 Web Admin Tool in combination with SP2 to remotely erase sensitive data from the device.



"We've always been a very pro-Microsoft company so the fact that we are able to utilize Exchange ActiveSync on these Sony Ericsson devices is ideal. Plus the ease of management and deployment along with the low-impact RoadSync had on our IT resources, both initially and ongoing, frees me up to move on to other projects," stated Cremers.

The Results

GIMV's team of investment managers cover the globe with the US and European markets being its primary focus. Both its executives and investment managers must stay up-to-date with the latest market information, stock market fluctuations, deal flow and other data no matter where they are. Keeping up with this ever-changing market and business data using RoadSync has allowed the team, regardless of time or location, to remain competitive and responsive to clients. They are able to make better use of downtime with the ability to access messages offline to read and compose responses during flights which are automatically sent as soon as a data connection is made available again. Given the frequency of business travel, push e-mail has become essential for the investment team and has overall improved customer service and client relations.

"We find that our investment managers and executives are able to more quickly discuss issues with each other and with clients, often times sending their responses out the same day using Roadsync while traveling. In the past, they would have had to wait until they could connect their laptop late at night upon arriving at their hotel room. RoadSync on the Sony Ericsson P900 and P910 smartphones with push e-mail gives users constant access to the information they need. In addition, the ROI of using Roadsync for our company has been huge compared to implementing Blackberry," concluded Cremers.

About DataViz, Inc.

DataViz is an industry leader in developing and marketing Office compatibility and productivity solutions across a variety of platforms including Palm OS, Symbian OS, Java, Windows and Macintosh. Founded in 1984, DataViz began its business developing file conversion software and has since expanded its expertise to providing solutions that meet the increasing demands of the handheld and mobile markets. With solutions that include its award-winning mobile Office suite, Documents To Go, and wireless Outlook synchronization solution, RoadSync, DataViz is committed to providing premium solutions that mobilize 'Microsoft Office' for today's knowledge workers and provide instant access to critical files and business data. DataViz is a member of Forum Nokia Pro, Palm Plugged-In Developer's program, Sony Ericsson Core+ developer's program and is a Symbian Platinum Partner and Orange Partner Premium member. In addition, the company has developed strategic partnerships with Microsoft, Palm, Sony, Apple and other industry leaders both domestically and abroad.

Steve Kradas

skradas@dataviz.com
+1.203.874.0085 x3082

Randy Figueroa

rfigueroa@dataviz.com
+1.203.874.0085 x3112

DataViz, Inc.

612 Wheelers Farms Road
Milford, CT 06461 USA
(P) +1.203.874.0085
(F) +1.203.874.4345