



**BlackBerry® solutions
for the Banking sector.**

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Mobilise banking procedures, securely and compliantly.

BlackBerry® solutions empower financial services and banking professionals with the tools they need to provide banking services when they're mobile, and manage client accounts securely and compliantly on the move.

As clients increasingly use and expect mobile services themselves, financial services firms are developing mobile strategies to build customer trust, meet expectations and maintain and improve their own market positions.

BlackBerry solutions provide the perfect platform on which to build those strategies – it's the only end-to-end mobile platform, which offers everything banking firms need to mobilise staff, banking systems and business processes safely. Mobile data is secure, and customer communications and actions taken in the field are fully auditable for compliance purposes.

Using BlackBerry solutions, financial firms can provide mobile staff with immediate and secure mobile access to different corporate applications, both bespoke and standard. The integration between applications is so easy and efficient that users can switch effortlessly between them. The BlackBerry platform enables financial organisations to create mobile solutions that are seamless to use and are so well-integrated with the core applications that they become a natural part of their employees' interactions.

Effortless Compliance

With the regulatory environment intensifying all the time, compliance has become one of the greatest challenges to banking profitability. Ensuring that transactions and customer communications are monitored and recorded appropriately can present a significant barrier to implementing mobility strategies.

Another key requirement to meet compliance regulations is to keep up to date with the ever changing world of financial markets. The BlackBerry mobile platform and third party applications allow the users to effortlessly overcome these challenges.

Secure Mobile Data

The banking industry relies on confidentiality and security. BlackBerry solutions are inherently secure, in order to meet the needs of financial institutions. With robust security built-in BlackBerry solutions offer the ability to mobilise business data and processes. The data held on BlackBerry® smartphones and in transit is encrypted at all times. BlackBerry smartphones can be protected with multi-layer security, and if lost or stolen they can be remotely disabled and wiped by administrators. Comprehensive IT management and administration tools allow administrators to control and record access to systems and applications, and to easily implement device and group security policies. The BlackBerry solution is the only mobile platform that is approved by Communications Electronics Security Group (CESG), the UK Government's National Technical Authority for information assurance.

Rebuild the customer relationship

Customer retention is top priority for financial institutions. BlackBerry solutions enable banking and financial services companies to extend their existing enterprise applications to the BlackBerry smartphones of their executives to provide a more responsive customer service, access to key information when needed and improve overall workflow responsiveness.

Benefits

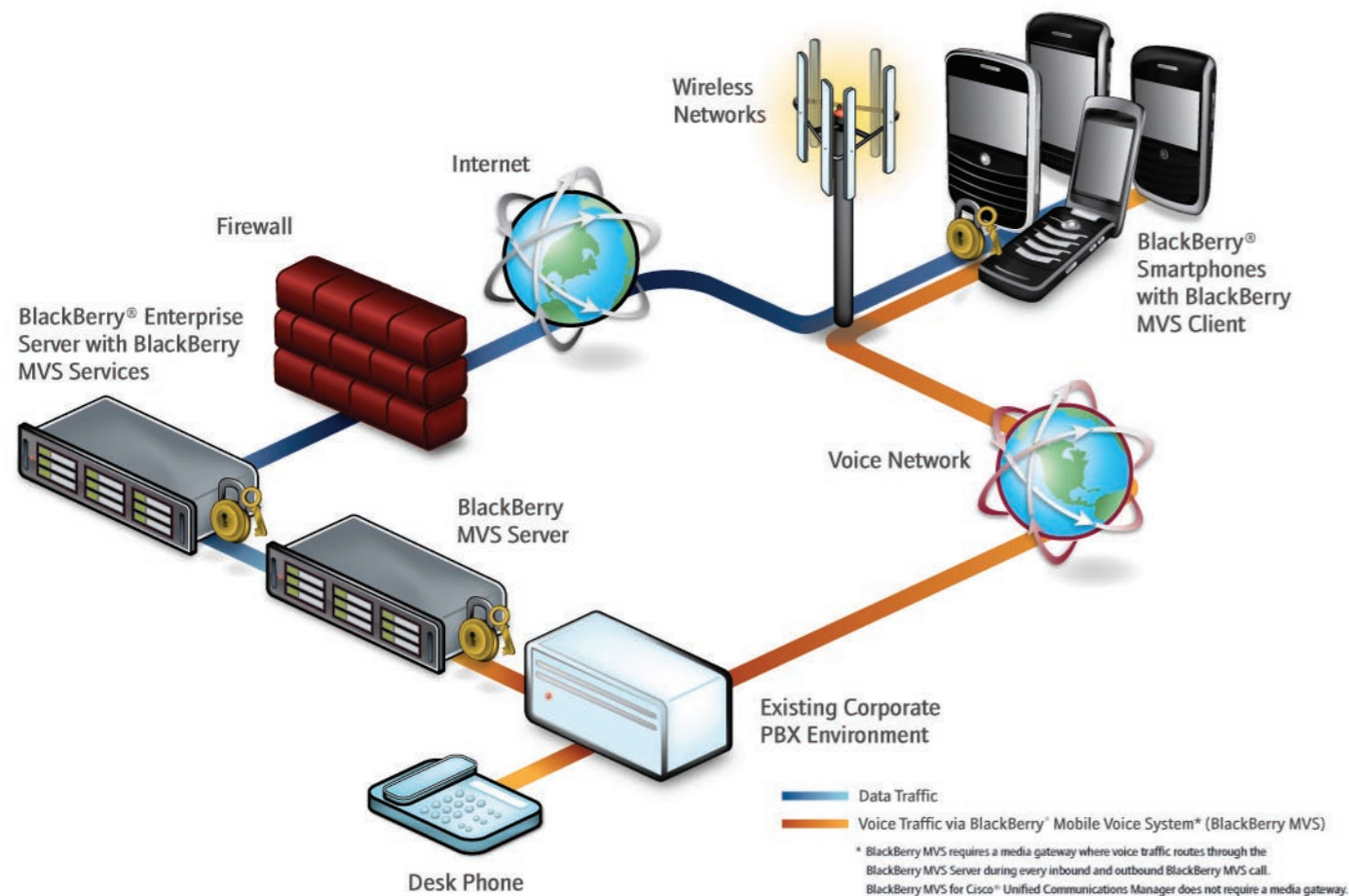
- The perfect platform to develop mobile strategies
- Secure mobile access to company data
- Fully compliant decision-making and auditable actions
- Manage risk proactively and make faster, well-informed decisions
- Real-time access to data to drive sales and build client loyalty

BlackBerry® Enterprise Solution.

Ability to empower employees with a great wireless mobile experience.

BlackBerry solutions for the Banking Sector – BlackBerry Enterprise Solutions

BlackBerry® Enterprise Solutions.



Wireless access to communications and information is no longer a luxury reserved for top executives – it is a business necessity for mobile workers throughout your organisation.

The BlackBerry® Enterprise Solution helps boost business performance by increasing overall productivity and allowing workers to make timely decisions based on the most accurate information available. The BlackBerry Enterprise Solution allows mobile users to access communications and information wirelessly, including:

- **Messaging and Collaboration Tools** – Proven BlackBerry® technology makes it easy for mobile workers to stay connected with colleagues and information.
- **Email** – Wirelessly extends existing enterprise email using automatic BlackBerry push delivery.
- **Instant Messaging** – Increase communication and collaboration with mobile access to enterprise Instant Messaging systems, including BlackBerry® Messenger.
- **Personal Information Management** – Complete wireless synchronisation of calendar, address book, tasks and notes keeps mobile workers up-to-date.

Access Desktop Features – Gives mobile users improved remote control of desktop features through BlackBerry smartphones, including:

- **Network drives** – access files from the BlackBerry smartphone using remote file explorer allowing users to view, edit and attach files to emails.
- **Email** – Flag important email messages and add, rename, delete or move email folders.
- **Attachments** – Download and edit email attachments.
- **Calendar** – Mobile users can pull meetings together while on the go by being able to see their colleagues' calendars and by having the ability to forward appointments.
- **Browser** – Mobile access to the web.

Enterprise Data – Wirelessly enables applications, intranets, data stores and back-end systems including customer relationship management, sales force automation, field service automation, business intelligence and more without compromising security, network capacity or battery life. All data between applications and BlackBerry smartphones flows through the BlackBerry Enterprise Server, which has achieved more independent security accreditations than any other product in the wireless market.

Enterprise Voice – Help ensure mobile professionals never miss a call by extending office desk phone functionality to BlackBerry smartphones, while enabling telecom administration for mobile calls with advanced phone functionality and visual menus.

Improve client service and business performance with mobile CRM and mobile Business Intelligence.

BlackBerry solutions for the Banking Sector – Mobile business knowledge

Challenge

Banking institutions are looking to rebuild customer confidence and are increasingly looking to mobility solutions to provide them with a new competitive edge.

Banks have made significant investments in CRM systems and Business Intelligence tools to help them retain clients, maximise the profitability of their customer base and to therefore make better informed decisions. These tools and solutions have traditionally been held within the enterprise, behind the corporate firewall, as any data leakage could potentially be catastrophic.

Financial organisations are looking for a mobile platform that will allow them to deliver these applications in a secure way to their existing BlackBerry smartphones and empower customer-facing sales teams to work more effectively by accessing business information as they need it.

Solution

Fortunately the BlackBerry solution is an ideal choice, being robust, inherently secure, fully integrated and easy-to-use.

The security features built into the BlackBerry Enterprise Solution can overcome data security issues, as data that is viewed by mobile bankers on the move remains behind the firewall, and IT administrators can control lost or stolen smartphones to ensure that data is not leaked. This level of control, which is unique to the BlackBerry Enterprise Solution, opens up many new potential channels for banks.

Whether your existing CRM or BI systems are bespoke or off the shelf, there are several applications available that allow you to mobilise these solutions on BlackBerry smartphones.

These include:

- Pyxis Mobile Application Studio
- iQlink
- SAP Business Object
- IBM® Cognos® 8 Go!
- Salesforce.com
- Aradiom

These solutions integrate customer, financial and operational data into a single information source for everyone, at every level of your organization.

Mobilising your CRM or BI system can help to increase user adoption within your organisation by providing flexible options to access and interact with customer data, reports or scorecards, wherever you are located.

Benefits

- Secure mobile access to corporate intelligence sources
- Rapid cost effective implementation of mobile solutions
- Easy to use
- Increase user adoption



Mobile training on the move to keep busy bankers compliant.

BlackBerry solutions for the Banking Sector – Mobile e-Training for Compliance

Challenge

Ensuring that busy banking professionals are up-to-date with the latest training requirements can be challenging, especially amongst senior executives.

These individuals can be difficult to reach, and it can be hard to ensure they find the time in their busy schedules to complete mandatory training to ensure individual and company compliance. Many such individuals may find that the only spare time they have to complete training is when they are travelling or away from their desks.

The ability to deliver training modules to bank employees' BlackBerry smartphones allows them to complete their training at a time and pace that suits them and so improving completion and compliance rates.

Solution

Third party applications offer mobile training for compliance solutions using BlackBerry smartphones. These solutions allow banks to extend their learning, development and compliance programmes beyond the desktop environment, delivering more cost-effective training, increased return on investment in BlackBerry smartphones, and improved learner performance.

These solutions can track and report on delivery, opening and completion of training modules, allowing administrators to track real-time progress with training and providing documentary proof of compliance.

These applications enable organisations to securely deliver content such as courses, surveys, assessments, and some of them also offer rich media such as podcasts and videos. Thanks to the BlackBerry push technology, users can be alerted to new training requirements as they arrive. New training modules can be stored to be completed later, perhaps when network coverage is unavailable. This approach allows banks to take a "just in time" approach to training, ensuring that users are not swamped by a backlog of compliance requirements.

Benefits

- Reduced training costs
- Cheaper to develop than traditional desktop e-learning
- Improve ROI by leveraging existing investments
- Faster and earlier learning completion
- Greater end-user satisfaction



Secure, simple recording and storage of mobile voice calls.

BlackBerry solutions for the Banking Sector – Mobile voice recording for compliance

Challenge

Banking professionals on the move rely on mobile communications to keep them connected to markets, customers and colleagues. Their data transactions and email traffic are easy to track and record, but voice communication is often used to give and receive crucial instructions, and in some situations such as business continuity emergencies, mobile communication is the only viable way to keep business moving.

Financial organisations need a way to ensure that mobile voice communications are as compliant and auditable as any other form of communication. In the UK, recording desk phone conversations is an FSA requirement and increasingly, global financial regulators are looking for ways to include mobile communications within new regulations, to ensure that mobile calls are as tightly regulated as deskphone conversations.

Mobile voice recording would also enable bankers to be more efficient and confident in the accuracy of placed orders, the taking of client instruction and the processing of everyday workflow, without the need to confirm these instructions in writing.

Solution

There are several software solutions available which offer banks an easy way to comply with forthcoming regulations and empower their staff to deal confidently on their smartphone, knowing that the conversation is being recorded and so can be easily retrieved if required.

These solutions help financial organisations meet the risk management and compliance challenges which are created when bankers use BlackBerry smartphones. By enabling all aspects of mobile communications to be recorded, they bring mobile activity within the bank into line with existing fixed network communications compliance and risk management strategies.

Benefits

- Secure recording and storage of voice calls
- Regulatory compliance without end-user burden
- Easy to deploy, integrate and manage
- Reliably record all voice and SMS communications from anywhere in the world
- Secure end-to-end encryption



Mobile voice recording and storage solutions, as well as message archiving, compliance and Mobile Access solutions for BlackBerry smartphones include:

- Mobile Compliance Suite™ from Obsidian
- VoxRecord from Voxsmart
- Compliant phones
- Global Relay Message Converter and Archiver

These solutions leverage the BlackBerry platform's inherent security architecture to keep recorded calls safe. The BlackBerry platform's also allows the applications to be pushed out to the to end users' BlackBerry smartphones and allows IT managers to set IT policies that prevent end users from deleting these applications from the device.

Voice recording systems offer secure recording, storage and retrieval, and can cater for a wide range of requirements, from compulsory automatic recording of all calls for compliance purposes through to on-demand recording for important calls only. These solutions can include administrator risk alerts, call logs and management reporting to monitor and control recorded users.

Voice recording systems integrate with existing call recording and message archiving infrastructure, but can also enhance legacy systems, offering functionality such as single point search and replay, and real-time alerts if calls infringe pre-set rules. These rules can include calls to and from certain numbers, withheld numbers and even the use of certain key words or phrases.

Real time market data for better decisions.

BlackBerry solutions for the Banking Sector – Real time market data

Challenge

In today’s economic climate, banking professionals need to achieve results more efficiently and react more quickly to developing market situations.

With many banks under pressure to regain investor confidence, all financial services firms are looking for ways to re-engage their clients, add value to their investment services, protect themselves from increased competition and retain clients with differentiated services.

Meanwhile, client expectations continue to grow as competition for their business heats up. Today’s bankers are expected to have immediate answers, based on the most up-to-date information.

Solution

Using a BlackBerry smartphone to access real-time market data on the move gives mobile bankers the information they need to keep on top of positions and markets, and to react quickly when clients ask questions and give instructions.

There are several applications available for use on BlackBerry smartphones which can offer real time access to market data.

These include:

- Thomson ONE Mobile from Thomson Reuters
- Bloomberg Mobile
- Blue Mobile™ from Blue System (ME) Ltd.

These solutions enable bankers and the investor community to monitor their portfolios and watchlists and view the latest quotes, news, charts, and profiles when away from their desk.

Banking professionals can set alerts which integrate with the features of the BlackBerry smartphone to send notifications when target buy or sell prices are achieved. In a few clicks, bankers can view news, company descriptions, market leaders and laggards, price charts, market trends analysis and more. These solutions all offer easy-to-use interfaces which allow bankers to quickly switch between relevant screens, and to customise the information they receive.

Additionally some of the applications also allow users to create and manage portfolios and use watchlists (which can be shared with colleagues) as well as set alerts which integrate with the features of the BlackBerry smartphone to notify users when target buy or sell prices are achieved.

Benefits

- Instant access to current global financial data
- Monitor positions and portfolios
- Make better, faster decisions
- Alerts allow fluctuation tracking and breaking news
- Increase commission by encouraging higher trading volumes

Bloomberg



THOMSON REUTERS

Integrate systems and leverage your existing technology investments.

BlackBerry solutions for the Banking Sector – Systems integration

Challenge

All companies in the banking sector have already made significant investments in enterprise technology solutions and rely on these systems to provide desk bound services that support the profitability of the bank.

Banks know there is enormous value in successfully extending enterprise applications to mobile users, not least in opening a convenient and effective communications channel to mobile staff and improving the management of situations such as business continuity and disaster management, where staff need different ways to communicate and access procedures when the regular IT infrastructure might be unavailable.

Solution

There are several solutions available which offer banking companies a way to integrate other systems and extend the investment in wireless technology and BlackBerry smartphones.

These solutions allow organisations to deliver a high quality and consistent BlackBerry experience to their end users without the need for the internal skills to deliver, manage and support the day-to-day operation of a BlackBerry Enterprise Server environment.

Some of the systems integrators for the BlackBerry platform are:

- Interchange Group
- BlackBerry® Managed Service (BMS) from Berkley TS

These companies offer systems consultancy, training, design, planning and development services and can install, configure and support the mobilisation of business applications. They are able to integrate existing systems, procedures and information sources into a bank’s BlackBerry environment to provide a seamless mobile experience.

Some of them are also specialised in the design and development of custom mobile software for business applications as well as mobilising existing corporate information systems in all areas of mobile and remote working.

Benefits

- Service and infrastructure reviews
- “Always available” access to emergency procedures, reference documents, or training material
- Proactive Support of the BlackBerry Enterprise Server environment
- Centrally manage mobile information
- Custom Mobile Solutions



Enhancing the inbuilt security of BlackBerry.

BlackBerry® solutions for the Banking Sector – Extending security

Challenge

One of the biggest challenges for the banking sector in recent years has been the need to ensure the security of customer and transaction data, whilst improving operational efficiencies through the use of technology. Banks, more than any other sector, have embraced digital communication, with customers, partners and regulators. However with these communications improvements comes the risk of an accidental or malicious breach of data.

The ability to share sensitive customer information or detailed transaction histories is vital to the banking sector. Encryption and digital signatures are at the forefront of solving these challenges.

Solution

There are several companies available which enable banks to extend their security policy to BlackBerry smartphones. These include: PGP and SolidPass from Aradiom.

The PGP Support Package for BlackBerry works in conjunction with the PGP Universal solution and allows banks to extend PGP e-mail security to individuals who use computers, laptops and BlackBerry wireless devices. It provides users with e-mail encryption, digital signature, secured attachments and automated key management.

Aradiom SolidPass™ is a mobile Java ME soft token that provides a high level of security conveniently and cost effectively by giving enterprises the control and choice over authentication requirements.

Both solutions are easy to use and easy to manage, ensuring that policies to protect sensitive transactions are maintained across all parts of the organisation and beyond.

Benefits

- Enhanced security for email communications
- Compliant encryption
- Easy to implement, manage and use
- Cost saving by eliminating the need for production and shipping of the hardware tokens

aradiom
the phone reborn



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