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*Mark Smith, ICT Manager, Charles Stanley*

# BlackBerry Case Study

Charles Stanley  
*Financial Services*



# Stockbrokers select BlackBerry® as single platform for mobile application development

*MoboTel provide Bloomberg and MarketTerminal on BlackBerry*

## The Challenge

A member of the London Stock Exchange since 1852, Charles Stanley is one of the UK's largest and longest established Private Client stockbrokers. With its network of 25 branch offices throughout the country, Charles Stanley provides portfolio management services to private individuals and companies.

In 2004, Charles Stanley's IT department was receiving an increasing number of requests for mobile access to email. Its investment professionals were becoming much more mobile as a direct result of the company's commitment to providing personal attention to its clients. Moreover, its corporate finance arm was rapidly growing, also resulting in increased mobility.

At around the same time, the company's mobile phone contracts were up for renewal, so the IT department used the occasion as an opportunity to find a way to provide staff with access to email via a device connected to its mobile operator's network.

Faced with an overwhelming range of choices when it came to technologies and devices, Charles Stanley turned to MoboTel, a UK business solution provider, for help with selecting the right solution.

## The Solution

MoboTel began by drawing up a wish list based on its interviews with Charles Stanley. The Charles Stanley IT department wanted to "mobilise" several applications, starting with email and calendar. Several investment professionals wanted access to online services such as Bloomberg and MarketTerminal. Mark Smith, ICT Manager for Charles Stanley, and his team required that the solution be highly secure and work seamlessly with its existing Exchange Server. Moreover, deploying new devices would have to be quick and easy. It also wanted to remotely administer the company's IT systems from the new devices.

When it came to the choice of platform, the IT department's past experience showed that users would only adopt a solution that had a convenient form factor and a user-friendly interface. "Before we began working with MoboTel we had dabbled with a PDA/mobile phone solution," says Smith. "But we abandoned it – it was too clunky and awkward."

In early 2005, MoboTel proposed equipping Charles Stanley with a BlackBerry solution. The proposal landed on Smith's desk just before he was scheduled to be out of the office for a few weeks, so he seized the opportunity to trial BlackBerry during his absence. Another BlackBerry device was also issued to the IT Director.

A month later, he returned to the office convinced that BlackBerry was the best solution. "While I was away BlackBerry enabled me to keep working and stay in the loop – exactly what staff members had been asking me for," said Smith. "I called MoboTel immediately."

MoboTel installed BlackBerry® Enterprise Server 4.0 for Microsoft® Exchange. "The installation was incredibly easy," remarks Smith. "It took MoboTel a day to set up BlackBerry Enterprise Server and the devices. At the same time they trained our staff, who now run the system on a daily basis."

Using BlackBerry® Mobile Data System (MDS), which resides on the BlackBerry Enterprise Server, MoboTel also rolled out further applications to all the BlackBerry devices. In doing so, MoboTel extended the native office functionalities of the BlackBerry device with the addition of a spellchecker, wireless printing and remote access to network files and folders.

The first wave of devices was issued to the firm's directors. The next went to investment advisors at Charles Stanley Securities, its corporate finance arm. Today this 750-person company has over 50 BlackBerry® 7200 and BlackBerry® 8700 series devices with plans to add many more in the months ahead.



## The Advantages

"Push email was the big winner since it was what people were asking for the most," says Smith. "The users are amazed at how incredibly simple BlackBerry is to use." Each new user receives a quick tour of the device to show them how to use the main BlackBerry functionality – email, calendar and web access – as well as the other applications delivered by MoboTel.

Just as Smith had hoped, deploying new BlackBerry devices is "quite simple", as he puts it. "It only takes a few minutes to activate a new BlackBerry device over the air," says Smith. The deployment was further enhanced by MoboTel's on-site assistance and training.

With the help of MoboTel, adding other applications has also been very straightforward. "The IT staff use a Telnet client on the BlackBerry to administer our IT systems remotely and securely. It's much more convenient than having to come into the office every time something needs fixing," says Smith. "Mobotel also deployed a solution providing real-time Bloomberg and MarketTerminal data to a small group of users," he adds.

"MoboTel's ability to provide a 'customisable' subset of the Bloomberg and MarketTerminal systems to the BlackBerry device is a huge step forward for many tens of thousands of users in the financial services sector. For the first time, users of these systems can leave their trading desks knowing that they will receive price or volume alerts via BlackBerry, whilst on the move" – James Reynolds, Sales Director, MoboTel.

To support its growing population of BlackBerry users, Charles Stanley has a bespoke technical support contract with MoboTel, which provides BlackBerry users and the IT department with assistance by phone and email. "BlackBerry is exactly the kind of mobile platform that we needed – and we've just begun to scratch the surface of what's possible with BlackBerry." In effect, Charles Stanley is currently examining the next phase of application migration in conjunction with MoboTel.

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#### **About BlackBerry**

BlackBerry is an end-to-end solution developed by Research In Motion® Limited. Founded in 1984, Research In Motion is a world leader in the wireless communications market.

#### **For more information**

[www.blackberry.com/uk](http://www.blackberry.com/uk)

[europe@rim.com](mailto:europe@rim.com)

More information on this solution at [www.mobotel.com](http://www.mobotel.com)

**MoboTel**