






# Russell Investment Group delivers wireless email<sup>1</sup> to a distributed, global workforce


## SUCCESS SUMMARY

### Implementation:


 Palm Treo smartphones to speed customer response times


 Good Mobile Messaging for wireless email

 DataViz Documents To Go for viewing attachments

 SD card for self-service upgrades

### Result:

 Stronger customer relationships

 Improved mobile productivity and simplified IT support

## Case Overview

Russell Investment Group is a financial services firm with a strong email culture and global clientele. Its distributed workforce needed the ability to manage client assets at any time, from nearly any location. Russell sought an easy-to-use device delivering phone, wireless

email, and the ability to protect confidential client account information through secure data transmission and storage.

The Russell implementation included Palm® Treo™ smartphones with Good™ Mobile Messaging and featured a self-service program that enabled Russell employees to upgrade their own devices in less than 20 minutes. The Palm solution has resulted in more informed, effective investment management professionals who use phone and secure, wireless email to instantly respond to customer requests.<sup>1</sup>

*“For Russell’s global workforce, Palm hits the mark for usability, simplicity, and round-the-clock responsiveness to client needs.”*

— GREG NELSON, SENIOR TECHNOLOGY CONSULTANT,  
RUSSELL INVESTMENT GROUP

<sup>1</sup>Within wireless coverage area only. Email and web require data services from a mobile service provider. ISP and/or VPN may also be required. Some mail services may also require an account, and extra fees may apply

## THE PALM ADVANTAGE

The average payback period for Palm Treo smartphones is less than two months.

Sales and field agents using Treo smartphones experience productivity gains equivalent to \$11,125 in average annual savings per agent.

SOURCE:  
FROST & SULLIVAN, 2005

Companies using Treo smartphones include six of the Fortune 10, 43 of the Fortune 50, and 316 of the Fortune 500.

SOURCE:  
ZYME, 2006



## Challenge: Keeping pace with clients' investments in real time

Russell Investment Group manages over \$107 billion in financial assets and provides investment products and services in more than 35 countries worldwide. To compete in the fast-paced world of investment management, Russell requires a highly distributed workforce that can meet customer needs at any time, from any location. The firm's challenge involved:

- Enabling accessible, easy-to-use mobile communications for workers at a variety of levels –senior executives, investment advisors, sales representatives, and support staff.

- Upgrading from cradle-sync handheld devices.
- Avoiding investment in a proprietary system that would hamper Russell's freedom to integrate with other best-in-class global hardware.
- Protecting confidential client account data with a device that ensures secure data transmission and storage.

## Solution: Providing wireless access for continuous availability

"Combining phone and email in a pocket-sized device was critical to maintaining strong customer relationships," said Greg Nelson, Russell's Senior Technology Consultant. Aware that many Russell employees were experienced Palm users – already comfortable with the friendly Palm OS® interface – Nelson chose the Treo for its simplicity and usability. The Russell solution included:

- A three-month pilot that led to a rollout incorporating Motorola Good Technology Group's Good Mobile Messaging for email and DataViz's Documents To Go software for reading attachments.

- A Good Professional Services custom application delivered via an SD card script that allowed users to uninstall old software, save personal preferences, and install new software and upgrade the OS – all in less than 20 minutes.
- Distribution across multiple carriers, as well as an open infrastructure that enables Russell's IT group to adapt to whatever devices work best globally.
- Advanced security that includes encrypted data and the ability to kill (wipe data from) a lost or stolen Treo, and over-the-air provisioning.

## Benefits: Heightened response to customer needs

"At Russell, we are highly mobile and have a strong email culture," said Nelson. The Treo has thus become a critical component of Russell's global workforce, in which employees strive to offer round-the-clock accessibility from any location. The significant benefits of the project include:

- Enhanced customer service through secure, 'just in time' account and market information that shortens response time.
- Better accessibility to real-time email – without cumbersome laptops—that is critical to supporting employees' ad hoc workflows.

- Improved productivity for mobile workers who can respond to client inquiries at the airport, in a taxi, or between meetings.
- Simplified IT support with the Good network operating center that consolidates all carriers under one support umbrella.

Russell is already planning to infuse its Treo smartphones with additional sales, CRM, and presentation capabilities. "Russell's primary concern is client needs—and having a full range of solutions at our fingertips to address those needs," said Nelson. "The Palm solution helps our workforce stay in constant contact, regardless of location, so we can manage and exceed our customers' expectations."



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