

Case Study

# CX save at the buzzer!

## DataMotion delivers secure client-advisor communications for wealth management firm

### Challenges:

Replace a critical software platform with secure message center functionality integrated via API into a high-volume client services portal - ensuring seamless advisor support, complete access to past messages, no disruption to familiar communications – all while advancing data security compliance.

### Solutions:

DataMotion secure message center



## Background

This project was conducted on behalf of a major financial services (finserv) company known for its extensive asset management, advisory and insurance services. With more than \$875 billion under management and administration, its network of roughly 10,000 financial advisors serves more than 2 million individuals, businesses and institutions from across the globe.

## Challenges

Like most finserv companies, this organization offers account holders a self-service portal which enables online access to account information. In addition, they provide a secure message center within the portal, enabling communications with clients through a webmail feature. Through this, clients can send email and share documents with their financial advisors securely and in compliance with privacy and security regulations. Clients are made aware of new messages waiting in the message center through email notifications and mobile text messages (SMS).

The company has long understood this approach is necessary in order to provide a great customer experience (CX), as well as to protect clients and their own corporate reputation. As a result, this way of communicating became an important engagement tool for the company, with its advisors and clients exchanging more than 800,000 messages each year.

At its core, the center relied on integrated secure messaging software supplied by a global IT vendor. Unfortunately, the company faced a challenge early in 2018 when the vendor suddenly announced end of life and support for the software. With a near-term deadline to transition to a new system, they set out to find a solution that could not only maintain the CX and familiarity for advisors, but would improve security and compliance, all while being more cost effective.

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With no adequate migration path provided by the legacy vendor, “challenge” turned out to be an understatement. “They basically said, ‘we’re taking our ball and going home, we will no longer support or provide the solution,’” said the company’s solution architect. “We had a pretty tough date to meet. We knew we were going to have a very aggressive schedule and began looking at a lot of vendors.”

## Solution

With no time to waste, the company immediately put out an RFI. The hope was to keep its basic infrastructure largely the same and switch to a new secure messaging solution – a “lift and shift.” The main requirements for the solution were:

- Maintain and improve secure message center functions within the client services portal
- Keep the approach of using REST application program interfaces (APIs) for controlling the secure message center
- Migrate 2TB of client-advisor message data and attachments from the legacy system
- Provide access to migrated client-advisor message history in each active mailbox so clients would not see any difference
- Keep current active mailboxes, since a full “rip and replace” would be too costly
- Meet all compliance requirements in one of the most highly regulated industries
- Migrate the service to public cloud infrastructure without compromising security and performance
- Launch the new solution in 6-9 months

The deployment window for a project of this size was tight, to say the least. DataMotion, a leading provider of data privacy and security solutions, was already on the company’s radar - and its experience integrating secure message center solutions via its comprehensive APIs turned out to be the perfect fit. Unlike offerings from other vendors, DataMotion’s secure message center solution - deployed in Azure and managed by the company - met all the requirements and then some.



Foremost, DataMotion offers flexible secure messaging REST APIs, critical to swapping out the legacy messaging software. This allowed consistent operation of secure messaging and file transfer, while enabling the solution to integrate into the finserv company’s existing infrastructure and webmail interface of the client services portal. Only the discontinued software would need replacing – no large scale “rip and replace” of the portal or other critical enterprise infrastructure would be necessary (a vastly more expensive proposition that accompanied the proposals from other vendors).

Deploying the system on Azure enabled DataMotion to take advantage of the latest available Microsoft technologies to ensure scalability in a cost-effective way using such features as geo-redundant storage (GRS), site recovery for seamless disaster recovery (DR), load balancing, clustering and others.

Another critically important function is a state-of-the-art advanced monitoring system deployed by DataMotion to keep track of the system health and performance in real time, 24x7.

For the new solution, secure messaging as a service is delivered through the DataMotion SDX (secure data exchange) services platform. This includes the ability to link to a separate system for tracking and meeting compliance regulations, as well as integration with customer service systems.

“The best fit for us would be taking our existing services and swapping out the previous product logic that we communicated with – and that just wasn’t possible with other vendors,” explained the company’s solution architect. “With DataMotion, we could. We were able to still use our mailboxes and they had the APIs we needed to manage our message center. It was the ideal solution.”

Lastly, the project required not only the right technology, but the right team working together. DataMotion worked smoothly not only with the company’s personnel, but with their systems integrator. When the company identified two areas where DataMotion’s solution didn’t quite seem to meet their needs – importing messages and managing drafts – the DataMotion and systems integrator teams collaborated well to fill the gaps in the solution.

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“DataMotion said, ‘Alright, we’ll be able to do that, and in fact, those services actually make a lot of sense for our product,’” described the company’s solution architect. “That was one of the big drivers for us. DataMotion was willing to enhance the solution to make sure we had exactly what we needed.”

## Results

One of the keywords for the entire project was seamless. The whole transition absolutely had to be a non-issue for customers and advisors alike. On this front, the project succeeded wildly. The solution from DataMotion was successful from the outset, handling 10,000 messages between clients and advisors on the first day, with the familiar secure message center interface and user experience intact.

That's not to say there weren't challenges along the way - there were bound to be with such a project - but the DataMotion team stepped up to meet each one. "DataMotion wanted us to be completely satisfied, and our teams worked hand-in-hand throughout it all," said the company's solution architect. "There were a few hiccups - which is to be expected with a project of this magnitude and complexity - but they always went the extra mile to resolve issues quickly."

In fact, the new product delivered significant improvements. Push notifications are now integrated into the system. Reporting for compliance is also tied in and automated, requiring no effort from advisors. The project also helped the company take one more step towards a longer-term goal; eliminating all on-premise solutions and moving everything to the cloud.

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## Cost - Benefit Analysis

Beyond exceeding the technical, functional and operation requirements of the project, the DataMotion solution was also the most cost-effective. While other replacement proposals cost millions of dollars to implement due to wholesale “rip and replace” approaches, the DataMotion “fit for purpose” approach could be delivered more cost effectively – providing the benefits needed at a fraction of alternative proposals. And the familiarity that was so important to advisors and clients had an added ROI benefit - no retraining was required when employees made the switch. Add in the move to the cloud, combined with DataMotion’s managed services model, and the company also reduced IT maintenance, personnel and security costs associated with their secure message center service.

- Enhanced client communications
- Turnkey integration
- Cost-effective solution
- Automated compliance
- No retraining required

## The Road Ahead

Looking ahead, there are opportunities to extend secure message center functionality and the company values the commitment and leadership DataMotion has built in the secure messaging SaaS and communications platform as a service (CPaaS) category. While the secure email vendor landscape is crowded with point solutions and service silos, DataMotion has set itself apart with an API strategy that integrates security and compliance into the high-volume messaging and file exchange workflows inherent in the business processes of the finserv industry. The result is better communications between clients and advisors, which in turn improves outcomes at lower costs, without compromising information security.

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## ABOUT DATAMOTION

DataMotion, Inc. provides PaaS (API) and SaaS (pre-built) solutions that redefine how organizations collaborate and share information with their customers and partners. Leaders in government, financial services, healthcare, insurance, and call center markets leverage our services to accelerate their business processes through modern, secure digital exchange. Our PaaS connectors and APIs enable secure, modern information exchange, allowing developers, software vendors and system integrators to enhance their solutions rapidly and seamlessly. In the healthcare sector, DataMotion is an accredited HISP (health information service provider), Certificate Authority (CA) and Registration Authority (RA) of Direct Secure Messaging. DataMotion is privately held and based in Morristown, N.J.

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