

Fortune 50 Insurance Conglomerate

To make communication within the company more efficient, a Fortune 50 Insurance Conglomerate began to use text messaging. However, this introduced the risk of being non-compliant with strict regulations. To solve this issue, the insurance company turned to Micro Focus® Retain™ Mobile to archive all text messages.



Overview

In the aftermath of the scandals, incidents, and accidents that have occurred in the last few decades, there now exist more government regulations and requirements than ever before (with reason). Organizations such as FINRA and the SEC are dedicated solely to the protection of the integrity and the carrying out of these regulations and requirements. Communication of all forms is strictly scrutinized under these regulations, including mobile device communications. To comply with the imposed regulations and archiving requirements, organizations such as the Fortune 50 insurance conglomerate in Bloomington, Illinois, have turned to Retain Mobile to archive mobile communication.

Challenge

As the organization has grown, so has the need for its agents to stay connected. Mobile is essential to stay connected in business today, and this Fortune 50 insurance conglomerate uses BlackBerry smartphones for this purpose. These devices were implemented initially for phone communication only; however, everything changed in 2005 when Hurricane Katrina hit. The conglomerate needed a way for policyholders to communicate quickly and more effectively with their Dealer Broker Agent Network. Texting proved to be the answer, and although there were compliance risks involved,

the company adapted its communication policy to allow SMS or MMS messaging. This act improved customer service, but left the company exposed to risk.

As expected, texting did provide certain challenges for the company. It had to ensure that FINRA and Sarbanes Oxley regulations were followed with regard to text retrieval, monitoring, archiving, as well as the capability to conduct eDiscovery. To assist with these challenges, the company turned to Micro Focus for assistance with its BlackBerry devices. Retain Mobile by Micro Focus was installed for this Fortune 50 insurance conglomerate's 17,000 BlackBerry users and configured to validate that all message content, metadata, and time date stamps could be recorded and archived.

Solution

Retain Mobile provides the most effective solution for BlackBerry systems where retention, archiving and retrieval are essential. This is because Retain for BlackBerry pulls the data directly from the BES itself; therefore, individual BlackBerry device communication is tracked and logged without the need for an application to be installed on each BlackBerry device. It securely archives all SMS/MMS, BBM, PIN, and phone call logs for BlackBerry, along with all SMS/MMS and phone call logs for Android. This mobile data is archived in context,

At a Glance

■ Industry

Insurance

■ Location

United States

■ Challenge

A Fortune 50 insurance conglomerate in Bloomington, Illinois, needed to archive text messages from employee BlackBerry devices.

■ Solution

Use Retain Mobile to archive all SMS/MMS, BBM, PIN, and phone call logs for BlackBerry.

■ Results

- + Archives all other electronic communications such as email and social media
- + Stores all messages in a single, unified Retain data archive that users can easily access through the [Retain Web Access Archive Viewer](#)

Today, the company continues to remain compliant with regulations and industry requirements through its use of Retain Mobile.

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meaning you can view the full message string. It is very effective in BBM Enterprise archiving as well because Retain integrates directly with the BBM Enterprise app, eliminating the need for a separate app.

Results

Retain for BlackBerry archives all data to the Retain unified archive database. In addition to effectively archiving mobile messages, Retain archives all other electronic communications such as email and social media. All messages are securely stored in a single, unified Retain data archive that can be easily accessed through the Retain Web Access Archive Viewer, giving you a fully compliant archive that contains all your company's business communications. There, the data can easily be reviewed, retrieved, discovered, and published—on demand. This fully compliant archive became a powerful asset for this Fortune 50 insurance conglomerate and allowed them to take advantage of text messaging in their operations.

Today, the company continues to remain compliant with regulations and industry requirements through its use of Retain Mobile.

About Micro Focus

Micro Focus is a global software company with 40 years of experience in delivering and supporting enterprise software solutions that help customers innovate faster with lower risk.

By applying proven expertise in software and security, we enable customers to utilize new technology solutions while maximizing the value of their investments in critical IT infrastructure and business applications. As a result, they can build, operate, and secure the IT systems that bring together existing business logic and applications with emerging technologies—in essence, bridging the old and the new—to meet their increasingly complex business demands.



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