



## Windows Mobile Customer Solution Case Study



**Customer:** Cantor Fitzgerald  
**Web Site:** [www.cantor.com](http://www.cantor.com)  
**Customer Size:** 3,000 employees  
**Country or Region:** United States  
**Industry:** Financial services

### Customer Profile

Cantor Fitzgerald is a global financial service provider. The company has approximately 3,000 employees and maintains its world headquarters in New York City.

### Software and Services

- Windows Mobile® 5.0
- Microsoft® Server Product Portfolio
  - Windows Server® 2003
  - Microsoft Exchange Server 2003

### Hardware

- Will vary

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## Productivity Gains Drive Global Financial Company from BlackBerry to Windows Mobile

*“We plan to offer Windows Mobile powered devices because they will allow us to deliver a richer, more productive user experience.”*

*Brent Wilkins, Managing Director, Cantor Fitzgerald*

*As mobile operator contracts allow, global financial service provider Cantor Fitzgerald is switching from RIM BlackBerry to Windows Mobile®. Employees will be able to be more productive with anywhere, anytime access to Microsoft® Office Outlook® information and familiar desktop programs, while the company will benefit from strong security features, reduced IT complexity, improved application development, lower costs, and improved reliability.*

### Business Needs

Founded in 1945, Cantor Fitzgerald is a leading global provider of financial products and services for the equity and fixed-income capital markets. Its offerings include sales and trading, investment banking, market commentary, and market data. The company has approximately 3,000 employees and maintains its headquarters in New York City.

Like many financial companies, Cantor has many users of BlackBerry mobile devices, which the company's employees have come to depend on for remote access to e-mail and calendar information. Cantor began issuing such devices to people in 2000 and, by 2006, had deployed them to roughly 50 percent of its employees.

Although their form factors and e-mail capabilities have made the devices popular among users, the BlackBerry devices in use at Cantor also have presented several major drawbacks that restricted productivity for those users, including:

- **Limited usefulness.** Without the use of additional third-party software, BlackBerry users cannot use their devices to perform many other common PC-based tasks, such as working with Microsoft® Office Excel® spreadsheets.
- **Web browser incompatibility.** The Web browser included with the BlackBerry devices was not fully compatible with many Web sites.



The company's use of BlackBerry devices presented additional challenges to Cantor IT staff, including:

- **Additional infrastructure costs and complexity.** Cantor had to license, install, and maintain BlackBerry Enterprise Server (BES) to integrate with its Microsoft Exchange Server 2003 environment. As BlackBerry usage has grown, the number of servers required for that purpose has increased from one to three.
- **Increased load on the e-mail environment.** The way in which BES integrates with Cantor's Exchange Server 2003 environment adds significantly to the workload on the e-mail systems, which in turn reduces the number of Exchange Server users that each server computer can support.

## Solution

Cantor Fitzgerald is addressing the above issues by introducing Windows Mobile® powered devices to replace BlackBerry devices. "We plan to offer Windows Mobile powered devices because they will allow us to deliver a richer, more productive user experience," says Brent Wilkins, Managing Director at Cantor Fitzgerald.

Data synchronization and security were key considerations in the company's decision. Cantor is meeting those needs with the Messaging and Security Feature Pack for Windows Mobile 5.0, a Windows Mobile 5.0 feature that helps the company to easily integrate Windows Mobile with its Exchange Server 2003 systems running on the Windows Server® 2003 operating system. Key capabilities provided by the Messaging and Security Feature Pack include:

- Direct Push technology, which keeps users' calendars, contacts, tasks, and inboxes on

their Windows Mobile powered devices synchronized with Exchange Server in near real time.

- The ability to use Exchange Server to set security-related policies, which are pushed down to and enforced on the Windows Mobile powered devices.

"When combined with the availability of sleek, powerful new devices such as the Motorola Q and Palm Treo, the recent messaging and security enhancements in Windows Mobile have us convinced that it's now ready for the enterprise," says Wilkins.

## Benefits

The company's introduction of Windows Mobile will increase employee productivity through:

- **In-sync information.** Always-on, Direct Push technology keeps users' e-mail, calendars, contacts, and tasks synchronized on their Windows Mobile powered devices at all times, and gives users mobile access to the corporate Exchange Server address book.
- **Familiar applications and interfaces.** Windows Mobile will provide financial professionals with remote access to familiar desktop programs, such as Microsoft Office Excel spreadsheet software. Similarly, IT professionals can use the Terminal Services client in Windows Mobile to remotely connect to and administer corporate servers, check on database jobs, and so on. "Using a Windows Mobile powered device emulates the desktop experience and provides access to many of the desktop applications that I use, including video and feature-rich applications for Windows®, such as Excel and Word," says Wilkins.

The company's use of Windows Mobile also will deliver several benefits at a corporate level, including:

- **Strong security features.** Communications between Exchange Server and Windows Mobile are encrypted to minimize security risk. Plus, administrators can set policies that require the use of device-level passwords, configure devices to lock after a number of incorrect password attempts, or remotely wipe the memory of a device reported as lost or stolen.
- **Improved application development.** With Windows Mobile, Cantor can provide employees with richer, more customized mobile applications than is possible with BlackBerry devices—and can deliver those applications 40 to 50 percent faster.
- **Reduced IT complexity.** With Windows Mobile, Cantor will no longer need to license or maintain additional servers to support mobile users on the Exchange Server environment—nor will the company's administrators need to separately manage those servers.
- **Lower operating costs.** In addition to eliminating the costs associated with BlackBerry middleware servers, Cantor will no longer need to pay message delivery fees to a third party.
- **Improved reliability.** With a direct-connection model, Cantor will be able to avoid downtime due to third-party error, such as what happened on April 17, 2007, when a system failure at the BlackBerry data center knocked out e-mail service for some 5 million customers.