

Capturing and archiving iMessage client communications for global investment bank

Customer background

A mid-sized NY-based investment bank with 20+ global offices manages 800 corporate-owned devices tied to company-specific iCloud accounts. The firm was interested in capturing iMessage conversations between bankers and clients, ensuring these communications are archived within their existing archiving platform to comply with the SEC's recordkeeping requirements.



Requirements



iMessage as an official, monitored communication channel

Enable client interactions through this popular channel, while ensuring regulatory compliance and data governance



User experience

Deliver a seamless, native user experience on corporate-owned devices, driving productivity without compromising control



Flexible environment

Offer a solution that is easy to deploy and manage, accommodating the needs of both compliance and IT teams for streamlined operations

Solution

Choosing the right partner

The firm initiated a thorough vendor selection process to identify a technology partner capable of integrating iMessage into their existing compliance infrastructure. After rigorous testing and evaluations, they selected LeapXpert for its expertise in capturing iMessage, WhatsApp, and WeChat (planned for future integration) and for its ability to seamlessly integrate with the existing archiving platform.

Delivered solution

The LeapXpert Communications Platform was deployed as a SaaS instance.

It features built-in integrations with iMessage and the firm's archiving solution. Users simply leveraged their managed Apple IDs for self-onboarding, eliminating the need for IT team intervention, and streamlining the provisioning process to approximately 90 seconds. Each user can now communicate with clients using the native iMessage application, with every message being captured and automatically archived, including metadata and content. LeapXpert also provides 24/7 support to address any issues promptly.



LeapXpert's solution is a game changer for our client communication strategy. It seamlessly captures iMessage conversations, ensuring compliance with the SEC requirements and provides strict governance.



Chief Compliance Officer

Results



Compliant client communications

LeapXpert enables seamless communication, capture and archiving of client conversations over iMessage, with the potential to extend to other channels, enhancing client engagement and ensuring compliance with recordkeeping regulations.



User adoption

The native experience and ease of use facilitate greater acceptance among employees, driving strong and ongoing user adoption.



ROI

With a fast deployment, LeapXpert helps achieve low cost of ownership with a fully managed, configurable SaaS service.