



Needham Bank

Bankers and credit teams mobilized and made more efficient with ubiquitous information access across all mobile devices.

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James Gordon
First VP of Operations and
Technology

Needham Bank, headquartered in Needham, MA, is the quintessential community bank, serving Boston and its communities continuously since 1892. Needham Bank represents the evolution of community banking, bringing the latest financial products and technologies to customers, while maintaining an unwavering commitment to the communities served.

Challenge

Needham Bank had a major challenge to solve: providing secure access to financial files for recipients outside of the company. The organization’s large, project-based initiatives depended on it and email was no longer a viable option. For example, a construction loan or a high-end leased office park might involve 100 different appraisals, all of which needed to get into the hands of the appropriate lawyers and appraisers. However, being able to send the documents was just one piece of the equation; employees also needed to review documents, edit as required and easily collaborate to see projects through to fruition.

“We needed an efficient way to collaborate with each other internally and with our customers and partners,” said James Gordon, first VP for operations and technology at Needham Bank. “But, we also have very stringent security requirements and industry regulations that absolutely had to be met.”

Any collaboration solution chosen had to be deployed in a private cloud environment in order to maintain industry compliance. Plus, the bank required a truly agnostic solution – one that worked seamlessly across operating systems, mobile devices and various file servers and data repositories such as Microsoft SharePoint.

“We had thirty-plus years of data stored in SharePoint and we didn’t want to cut off access to that critical information source,” said Gordon. “We had to find a way to corral all of our content, while supporting the shift from laptops to iPads, iPhones and other mobile devices.”

Beyond the integration with established data repositories, it was also imperative to enable users to get at the information they needed without extra steps or assistance from the IT department. Accellion stood out, as all of its collaboration functionality was wrapped up in a single platform, eliminating the need for IT to manage how users were utilizing applications and solutions. However, it was the mobile enablement that was the biggest selling point. Needham Bank was already utilizing MobileIron to protect the devices of its employees, so deploying MobileIron’s App Connect to meld the two solutions together was a simple choice.

Quick Facts – Needham Bank



Deployed Since

2013



Number of Users

**250 internal
unlimited external**



Custom Web Interface

Yes



Email Integration

Yes



Mobile Platforms

**iOS and
Android**

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Solution

With Accellion in place, Needham Bank’s employees were able to access information in any way they preferred without impeding the way that they work. For example, the bank’s many internal committees use SharePoint religiously and now can access content right from mobile devices, use Accellion’s mobile editor to make changes, collaborate with colleagues about those changes and share final versions with external users – all from one place. MobileIron’s MDM solution ensures that even if a device were lost or stolen, the information employees were accessing is never at risk of a data breach.

“SharePoint was never meant to be mobile and I didn’t want to be forced to run multiple apps to translate the content to support our mobile organization,” said Gordon. “Accellion makes all of the information available through one source and it’s incredibly easy and effective.”

The bank’s credit committee in particular used to rely on email to share and update documents prior to meetings, creating serious version control issues and inefficiencies. Today, users simply upload the latest documents to an Accellion folder, use the built-in versioning and annotation abilities and rely on the notifications to update committee members when new documents are available, providing a huge time savings.

Accellion also serves as the go-to source to share information with auditors and because the data is on the bank’s server, the organization has a complete record of who has accessed each and every document.

The organization took a hard line when it came to consumer-facing applications and credits Accellion with de-incentivizing employees from seeking free – and unsecure – consumer-oriented solutions such as Dropbox and Google Drive.

“We blocked access to any file sharing and collaboration applications other than Accellion as we can’t risk having our proprietary data compromised,” said Gordon. “Frankly, there’s no need to use anything else as we benefit from private cloud security, maximum control over our data, mobile accessibility and easy-to-use collaboration all from one provider.”

Top Selling Point: True mobile enablement in a private cloud setting with data accessibility across any types of devices, content stores and operating systems.

Standout Functionality: Mobilization of SharePoint, with users able to easily download files, edit them locally, save updated versions and share with external users via the secure native Accellion mobile apps or any web browser.

Cool Use Case: Bank committee members annotate key documents prior to meetings via iPhones and iPads, with individuals automatically notified when files are updated and in final form, providing accurate version control and improved efficiencies.

About Accellion

Accellion, Inc. is the industry leader in providing private cloud solutions for secure access and sharing of enterprise information across devices, enabling employees to work securely wherever. Founded in 1999, Accellion is an award-winning, private company headquartered in Palo Alto, California with offices in North America, APAC, and Europe. The company has evolved from its roots in cloud storage into a leading enterprise security software provider. More than 12 million business users and 2,000 of the world’s leading corporations and government agencies, including Procter & Gamble; Indiana University Health; Kaiser Permanente; Lovells; Bridgestone; Harvard University; the Securities and Exchange Commission; and NASA use Accellion solutions to protect confidential information, ensure compliance, increase business productivity, and reduce IT costs.

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