

WCM INVESTMENT MANAGEMENT



Based in Lake Forest, Calif., WCM Investment Management provides innovative, equity investment advisory services to corporations, public funds, Taft-Hartley plans, endowments and foundations, as well as individual investors.

OBJECTIVE

WCM wanted to be sure it retained Internet connectivity in the face of a potential natural disaster like an earthquake or fire. The events of 9/11 highlighted the importance of disaster recovery and the SEC has since made it an ongoing focus of its regulatory efforts. The company needed a solution that would give it the ability to conduct business from anywhere.

During a disaster, WCM needed to continue conducting business productively using wide-area wireless connectivity, so they didn't have to rely on hardwire or Wi-Fi connectivity. "We have an accounting system that houses client information," says David Brewer, COO of WCM. "Since market conditions drive our decisions to buy or sell securities, we have to be responsive to what's happening in the stock market no matter what's going on around us—even if our building is burning down."

SOLUTION DESCRIPTION

WCM chose to deploy EV-DO connectivity to access the Internet from anywhere. The company runs a multi-OS environment including both Windows® and Mac computers, with the Citrix Access Platform driving its Windows network. Its systems integrator, Zumasys, opted to install Sierra Wireless AirCard® 580 PC cards across both Dell and Mac laptops running on Verizon Wireless' BroadbandAccess (EV-DO). This involved manipulation of the AirCard 580 driver to work on the Mac machines.

WCM's trading and CRM software—InData, SalesLogix CRM and MS Exchange—are highly graphical and have mission-critical applications. Zumasys was instrumental in getting the applications to run smoothly over the 3G CDMA mobile network. Now WCM managers can function anywhere as if they were sitting at their desk—with no degradation in performance.



www.wcminvest.com

COMPANY

- Based in Lake Forest, Calif., WCM Investment Management provides innovative, equity investment advisory services to corporations, public funds, Taft-Hartley plans, endowments and foundations, as well as individual investors.

OBJECTIVE

- Retain Internet connectivity in the face of a potential natural disaster and enhance productivity

SOLUTION

- Verizon Wireless BroadbandAccess (EV-DO)
- Sierra Wireless AirCard 580 PC cards
- Zumasys system integration
- Citrix Access Platform
- Windows and Mac laptops
- Treo 650 smartphones

RESULTS

- Achieved compliance with SEC disaster recovery mandates
- Created a virtual office environment that extends to wherever its users go
- Boosted communication with clients and overall productivity



A LIST™
Finalist



WCM Investment Management is a 2006 finalist for the 3G A-List Award in the Small Company category.

The 3G A-List Awards recognize the leading builders of successful wireless data solutions based on 3G CDMA (CDMA2000 1X, EV-DO, and UMTS/HSDPA) technology. **To learn more about the A-List, please visit www.3galist.com**

The EV-DO deployment also spurred an entire server consolidation and disaster recovery plan. WCM went from 12 office servers to two, moving the application servers to a “hardened” AT&T data center. “Now we have the comfort of being able to make trades and manage our customers’

All of our 22 employees love the freedom. Between the Treos and the PC cards, our staff can be truly productive when they’re mobile.

*David Brewer
COO
WCM Investment Management*

money through virtually any disaster,” says Tom Rydzeski, manager of IT for WCM. “We have a fiduciary responsibility to our clients and are legally required to have plans in place for how we’ll continue functioning in the face of a disaster.”

Beyond the disaster recovery impetus, Rydzeski also saw day-to-day remote access as a valuable advantage in productivity and convenience. “We have employees who work outside the

corporate office, several who travel regularly, and virtually all who benefit from home access to the network,” he notes.

RESULTS

WCM’s mobile broadband PC cards have made connectivity possible from anywhere. “All of our 22 employees love the freedom,” Brewer admits. “We have people in our research area that go to various companies whose stock is carried in our portfolios. They can get on our system without having to find a connection and build reports while their ideas are still fresh.”

One interesting offshoot is the way WCM uses both its laptops and its handheld devices. “We have a lot of Treo™ 650s in the office enabled with GoodLink to stay abreast of incoming email,” Brewer explains. “Both pieces of equipment are important parts of our toolset. Oftentimes, we receive initial information on our Treos. We can respond using the handheld, but if the answer is complicated or we need to address a larger issue, we can then go online with our PC card equipped laptops wherever we are. It’s the combination of these two tools that makes our staff truly productive when they’re mobile.”

WCM found email access to be a priority across its EV-DO implementations. “Our managers can communicate with clients and peers more immediately, which has enticed them into using it more and more,” Brewer acknowledges. “In a short time, it’s become ingrained in our corporate culture. In fact, we were able to do an offsite corporate retreat where we pulled everyone in for a day and a half. Between the Treos and the PC cards, we could fully conduct our business as if we were sitting onsite, and still meet the objectives of our meeting.”

SUPPORTING PARTNERS

The A-List also recognizes supporting partners for their enabling role in assisting winners with their wireless data deployments.

