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## Why RIM Really Wants DataViz: And Why Everyone Got it Wrong!

*Last week, RIM announced it is acquiring some of the assets of DataViz and most of its employees. It's rumored that RIM paid the modest sum of less than \$50M, although they have not confirmed that. We believe that this is indeed a good acquisition for RIM, but also believe that the reports saying RIM acquired DataViz for its Documents To Go product got it mostly wrong.*

There is no doubt that Documents To Go is a critical feature on RIM's devices, providing BlackBerry (BB) users with the important ability to edit Microsoft Office documents. This is a vital productivity function for many enterprise users. Clearly, RIM wants to continue offering this capability on BlackBerry and having ownership over the product is highly advantageous. But we believe that RIM has its strategic sights set on another key piece of DataViz's (DV) technology which has gone largely unnoticed, and which has played a less prominent role in DV's overall business. That technology is its RoadSync secure mobile PIM product. And even if this wasn't RIM's primary intent in acquiring DV, we expect it to play prominently in RIM's future strategic planning.

With the acquisition of RoadSync, RIM gets a number of benefits. First, it gets a license for Microsoft's ActiveSync technology (DV was a strategic licensee). Although to some extent ActiveSync is a direct competitor to RIM's BES and NOC-based solution, it could nevertheless be a helpful technology to RIM. It could allow RIM to better integrate both BB and non-BB devices by modifying BES to act as a management platform for ActiveSync enabled devices. And it could allow the pass-through of many Exchange policies through critical products for RIM such as BES Express.

Next, RoadSync currently has clients for both Android and S60 devices (the OS powering most Nokia smartphones). Although it does not integrate with the native device email and calendaring, it does provide a secure and manageable alternative for the many companies that require more security than the base platform can provide. And it is being installed on tens of thousands of smartphone devices by OEMs (many Nokia devices ship with RoadSync installed).

RoadSync provides many of the enterprise capabilities that native Android does not support (e.g., encryption, device wipe, Exchange policy enforcement). By tying the back end of RoadSync into

BES, RIM could enable the increasing number of mixed device shops a way to control, BB, Android and S60 devices all from the same console (albeit with more limited management capabilities for Android and S60 than BB).

RIM could build a solution with RoadSync that allows it to offer essentially a BB client on other devices (a modern upgrade of the BlackBerry Connect product of years past). This could be very attractive to Nokia who needs a better way to connect to enterprise email and calendaring, and could present a way to boost the inferior security and manageability of Android devices while maintaining the BB foothold in the enterprise. This would also be attractive to the increasing number of enterprise shops supporting multiple platforms and increase the value of BES (and BB "Stickiness"). And finally, RoadSync could present a good off-BB mobile client opportunity for RIM as it markets its own email platform (through its Alt-N Technology acquisition) to SMB.

A further scenario for RIM deploying DV technology includes creating a compelling, directly marketed to business users BB-like experience for Android and S60, thereby securing and managing platforms that aren't very secure or manageable. This might even be extended to iPhones. This has been a lucrative market niche for companies like Good Technology and Sybase that add special client-side apps to achieve enterprise-class capabilities. RoadSync with a direct connection to BES, could provide an off-BB platform experience similar to BB for the many companies that are diversifying their devices, and in direct competition to the above third party solutions providers. Priced attractively, this could eliminate them from the market. It could also ensure BB stays compatible with the enterprise by allowing RIM to offer companies BES to control their non-BB devices, and making the deployment of future BB's easy.

**Bottom Line:** While there is no doubt DV's Documents to Go technology is key to RIM's long term success, it is not the only technology RIM gets with its acquisition, and longer term, may not even be the most strategic. Unless RoadSync was not part of the package, we believe that this technology could be a key to keeping mixed device shops on the BB base and provide a way for RIM to fight back against its competitors' encroachment. Finally, it could allow RIM to essentially eliminate its third party mobile email competitors.

*Jack Gold is the founder and principal analyst at J.Gold Associates, an information technology analyst firm based in Northborough, Mass., covering the many aspects of business and consumer computing and emerging technologies.*

***For more in-depth comments or analysis on this or other subjects, feel free to contact us.***

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