



# Mobile CRM for BlackBerry®

*“Having customer information available at our fingertips on a BlackBerry provides our people with the information they need exactly when they need it.”*

Faron G. Thompson, Managing Director,  
Income Property Finance Division,  
Primary Capital Advisors



## Win More Deals with Maximizer CRM 10.5 Freedom

Make the hardest working smartphone work even harder for you. Staying productive in the field demands a CRM solution that will work seamlessly with your BlackBerry®, enhance already powerful features and make it the most efficient and intuitive tool for success on the road. Maximizer CRM 10.5 Freedom will boost your productivity, enabling you to stay better informed, win more deals and get your mobile workforce up and running — all on the latest BlackBerry smartphones.

Whether you're in sales, on a service team, or a frequent-flyer executive, your BlackBerry mobile device will give you the competitive edge to work at the speed your customers and business demand — anytime, anywhere. Leverage the mobility of your device and the power of CRM to win more deals and succeed in the field.

### Build profitable relationships

- Respond on-the-fly to maximize wins and engage existing customers.
- Prepare for your next interaction with a complete view of customer information — including activity, account status and financial history.
- Track each customer's history, including conversations, transactions and service cases to deliver value, build loyalty and increase repeat business.
- Maximize customer satisfaction by resolving and updating service cases<sup>i</sup> in the field.

### Increase productivity and optimise sales resources

- Improve customer interactions with immediate access to leads, opportunities and cases.
- Conduct timely follow-up and keep deals moving, with access to updated details of sales opportunities.
- Instantly turn customer address details into maps and directions on your BlackBerry.
- Log calls, SMS text messages and emails to customer records with one-click.
- Increase capacity for customer data with Secure Digital (SD) card storage.
- Integration with BlackBerry built-in address book, email<sup>ii</sup> and phone enables you to immediately create new records, opportunities, cases and notes within MaxMobile<sup>iii</sup>.
- Schedule meetings or required tasks directly from BlackBerry email to MaxMobile.
- Minimise administration work back at the office and stay on top of follow-up activities through email while on the road.

### Collaborate and access from anywhere

- Consolidate customer communications into one convenient, action-oriented workspace.
- Upload the customer records you wish to synchronise, directly onto the device.
- Access local data on your BlackBerry device offline for faster performance.
- Tap into valuable corporate resources through online Company Library<sup>iii</sup> access to send brochures, quotes and other documents to customers and prospects.
- Share information — including calendars, sales opportunities, and customer emails — with other team members, wherever you are.
- Synchronise wirelessly<sup>iv</sup> from anywhere, or through a USB cable to maintain updated information on your BlackBerry and with Maximizer CRM in the office.
- Access the entire corporate CRM database through your wireless web browser to look up records that aren't synchronised to your smartphone.
- Empower IT administrators to get your mobile workforce up and running quickly, with easy deployment of MaxMobile to field staff through wireless push and single-click installation\*.

# Maximizer CRM 10.5 Features

- Account and contact management
- Time management
- Task management and automation
- Sales force automation
- Sales forecasting
- Marketing automation
- Email marketing
- Customer service management
- Microsoft Office integration
- Outlook & Exchange synchronisation
- Accounting integration
- Business Intelligence
- Workflow automation
- Partner relationship management
- eBusiness
- Access options: mobile devices, web, Windows desktop, remote synchronisation

## Technology Partners



## Certified Solution Provider

CABC Ltd  
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 Newbury, RG14 1AS  
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## Measure performance and potential

- Make real-time updates from the field on lead status and qualification, forecasted revenue and sales opportunity details.
- Monitor the status of your business and team performance at a glance, with dashboards\* and reports accessed through your mobile web browser<sup>ii</sup>.
- Make timely decisions and take necessary action by staying better informed with real-time information.

Maximizer Mobile CRM	MaxMobile	MaxMobile Lite
<b>Supported Mobile Devices</b>		
BlackBerry <sup>®</sup> 7000, 8000 & 9000 series including Curve, Pearl, Bold, and Storm <sup>*</sup>	✓	✓
<b>Supported Maximizer CRM Editions</b>		
Group, Professional & Enterprise Editions	✓	
Entrepreneur Edition		✓
<b>Synchronisation &amp; Access</b>		
Two-way data synchronisation	✓	✓
Wireless synchronisation (Add-on Wireless Sync Server required)	✓	
USB synchronisation	✓	✓
Wireless Web Access	✓	
<b>Supported CRM Features</b>		
Companies and Contacts	✓	✓
Leads	✓	
Notes	✓	✓
User-Defined-Fields	✓	✓
Tasks	✓	✓
Calendar appointments	✓	✓
Sales Opportunities	✓	
Customer Service Cases	✓	

i. Customer service case management available through Wireless Web Access.

ii. Using Maximizer Mobile CRM with BlackBerry<sup>®</sup> smartphones requires Maximizer CRM licenses, server, and MaxMobile for BlackBerry<sup>®</sup> licenses. Supports BlackBerry 7000, 8000 & 9000 series including Curve, Pearl, Bold, and Storm. Check <http://www.max.co.uk/mobile-crm/mobile-crm-options.html> for system requirements and supported devices.

iii. Company Library available through Wireless Web Access.

iv. Wireless synchronisation requires Wireless Synchronization Server, which is an additional product with add-on fees. USB synchronisation included with MaxMobile and MaxMobile Lite.

v. Mobile dashboards available through Wireless Web Access.

\* Included with Maximizer CRM 10.5 Freedom release.

### Why Maximizer CRM 10.5

1. **Simple** and quick to deploy, learn, use and maintain.
2. **Access** to critical information through mobile devices, the web and Windows desktop options.
3. **Best value** in its class for full-featured CRM.
4. **Expertise** of 120,000 customers over 20 years and over 1 million licenses sold

Maximizer CRM helps small and medium-sized businesses maximize sales, customer satisfaction and profitability through increased business productivity and optimisation of limited resources.

### Visit [www.maximizer.com](http://www.maximizer.com) for:

- Information based on your role: sales, marketing, service, executive, IT
- Information on CRM and Contact Management
- An overview of features and technology
- Online demos and free trial software
- White papers and webinars on CRM best practices

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**Maximizer Software**  
 Simply Successful CRM