

BUSINESS CONSULTANTS INCREASE PRODUCTIVITY AND IMPROVE CUSTOMER SERVICES WITH BLACKBERRY SOLUTION AND MAXMOBILE FROM MAXIMIZER SOFTWARE



Collier Pickard is one of the UK's leading CRM (customer relationship management) consultancies, specialising in mid-market companies and divisions of global corporations. The firm offers a full range of CRM products, including Maximizer CRM, a proven and affordable CRM solution for small to medium-sized firms. Collier Pickard not only implements Maximizer for its customers, it also uses the solution as the firm's own CRM system.

THE CHALLENGE

According to Alan Joenn, Account Director at Collier Pickard, Maximizer CRM plays a crucial role in the firm's business, enabling it to generate profitable growth in today's highly competitive business climate, through better customer service and more efficient sales and marketing. The Maximizer CRM system was best suited to office-based staff as users had to connect to the CRM system via a PC. Collier Pickard realised that this was not always convenient for their field sales staff and wanted a solution that would, as Joenn describes, "put our full CRM application in the hands of mobile users. We wanted the system to synchronise the changes they made in real time so we didn't lose the 360-degree view of the client that the Maximizer CRM system provides."

THE SOLUTION

Collier Pickard decided it wanted to provide mobile access to Maximizer CRM via Maximizer's *MaxMobile* application for BlackBerry®, which integrated well with their existing BlackBerry® solution it already used for email. Joenn originally picked the BlackBerry smartphone because the firm considered it to be the "corporate standard" for smartphones, providing a superior level of security, ease-of-use and reliability that had won over the firm's mobile users since its initial deployment.

Now Collier Pickard wanted to increase the functionality of the existing BlackBerry solution by deploying MaxMobile, providing a simple, easy-to-use interface with access to all their corporate CRM information. Until recently Joenn had been unimpressed with the options available. "Several companies have tried to bring mobile CRM applications to different kinds of handhelds, and they've all been, at best, cumbersome, and at worst, unusable," says Joenn. This had been due to limited functionality, poor usability or slow data speeds.

Things changed in 2008, according to Joenn, when Maximizer Software released the latest version of *MaxMobile for BlackBerry*, which Collier Pickard implemented in the autumn of 2008. "MaxMobile is a version of the Maximizer CRM system that runs in native mode on the BlackBerry smartphone. It's not a web-style look-up: you actually have full access to full CRM data on the BlackBerry via the application, including customer records, calendar and to-do list," explains Joenn. All changes made using MaxMobile are updated automatically on the Maximizer CRM system, and any changes to the system made by other users are immediately visible to the BlackBerry users. The synchronisation is handled by MaxMobile Wireless Server via the BlackBerry® Enterprise Server.

BENEFITS

**INTUITIVE AND EASY
TO USE**

**MOBILE ACCESS TO
CUSTOMER INFORMATION**

**MAXIMISE EXISTING
CRM INVESTMENTS**

**IMPROVED PRODUCTIVITY
AND CUSTOMER SERVICE**

"I can walk out of a meeting, sit in my car and send the client an email confirming what we just agreed to. Or I can send an email to an office-based colleague asking him to send along the documents the client asked for. It's in the client's inbox five minutes after I walked out the door. It's a very effective way of working."

Alan Joenn,
Account Director, Collier Pickard

THE BENEFITS

For Collier Pickard, MaxMobile for BlackBerry extends the benefits of the CRM system to mobile users by "closing the loop," as Joenn calls it. "Everything I'm doing on my BlackBerry I'm doing through my CRM application, so none of that communication is lost," he says.

With MaxMobile for BlackBerry, note taking is done in real time in the field, so information is never lost or forgotten. In the days before the MaxMobile solution, Joenn, like many users, would take handwritten notes of client meetings, which he would enter into the firm's CRM system on his laptop afterwards. Subsequently, it would take a while for his notes to enter the system. Worse, some users would forget to transcribe their notes.

"With MaxMobile for BlackBerry, a user can update the CRM database while on the move, something they couldn't do easily with a laptop." The usefulness extends into the meeting itself. Joenn frequently pulls out his BlackBerry smartphone to access the CRM system in the middle of a discussion, to schedule the next appointment or update contact details, for example. "MaxMobile for BlackBerry makes it possible for me to leave the office with just my BlackBerry, go to a client meeting, and be more effective than if I had my laptop with me," says Joenn.

One of the features he appreciates the most about MaxMobile for BlackBerry is being able to prepare for meetings without having to print out documents beforehand or call a customer service rep for an over-the-phone briefing. This feature alone recently won Collier Pickard a new deal with a major British financial services company with operations in London and Glasgow. "They're going to provide MaxMobile for BlackBerry to their account managers, eliminating the need for dedicated sales support staff, who used to compile customer briefings for the account managers. Now the managers can brief themselves, which reduces the company's fixed overhead costs," explains Joenn.

BlackBerry smartphones with MaxMobile also improve customer service. "I can walk out of a meeting, sit in my car and send the client an email confirming what we just agreed to," says Joenn, "or I can send an email to an office-based colleague asking him to send along the documents the client asked for. It's in the client's inbox five minutes after I walked out the door. It's a very effective way of working," he continues.

Joenn says the MaxMobile for BlackBerry application gives him the ability to be more productive overall, and not just for a single meeting. In between appointments he can "check my to-do list, make some calls while waiting." He does this all from the MaxMobile application on his BlackBerry smartphone, so his actions are captured. "It's something I wouldn't do if I had to bother with opening up my laptop." Joenn estimates that MaxMobile for BlackBerry saves him "several hours" a week during periods when he works out of the office.

Finally, Collier Pickard's experience with the MaxMobile for BlackBerry shows how it can be a positive agent for change. "When you deploy CRM in a company, there's one group of users who are the most difficult to get into a culture change – the sales force. The easier you make it for them to integrate the CRM system into their way of working, the more effective the CRM system becomes for everyone. In a nutshell, that's what MaxMobile for BlackBerry does."

For further information: www.blackberry.com/go/success

BLACKBERRY CASE STUDY
COLLIER PICKARD

