



## Mobile CRM for BlackBerry® for Financial Advisors

*“Having client 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



**BlackBerry™**  
Alliance Member

### ***Build Your Business 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** and **MaxMobile<sup>i</sup>** will boost your productivity, enabling you to stay better informed and win more deals — all on the latest BlackBerry smartphones.

Whether you’re building your book of business, servicing priority clients or staying on top of fluctuating markets, your BlackBerry mobile device will give you the competitive edge to work at the speed your clients 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 clients.
- Prepare for your next interaction with a complete view of client information — including portfolio activity, account status and financial history.
- Track each client’s history, including conversations, transactions and investment notes to deliver value and build loyalty.

#### **Increase productivity and optimize your resources**

- Improve client interactions with immediate access to client and prospect information.
- Conduct timely follow-up by setting next tasks and appointments.
- Instantly turn client address details into maps and directions on your BlackBerry.
- Log calls, SMS text messages and emails to client records with one click.
- Increase capacity for client 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 client records, opportunities and notes within MaxMobile.
- Stay on top of follow-up activities, scheduling meetings or required tasks, directly from BlackBerry email to MaxMobile while on the road.

#### **Collaborate and access from anywhere**

- Consolidate client communications into one convenient, action-oriented workspace.
- Focus on your territory by loading the client records you wish to synchronize, directly onto your 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 fund reports, investment newsletters and other documents to clients and prospects.
- Share information — including calendars, sales opportunities, and client emails — with your assistant and other colleagues, wherever you are.
- Synchronize 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 synchronized to your smartphone.

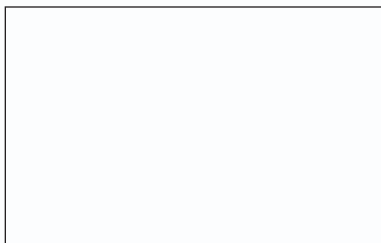
# Maximizer CRM 10<sup>5</sup> Features

- 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 synchronization
- Accounting integration
- Business Intelligence
- Workflow automation
- Partner relationship management
- eBusiness
- Access options: mobile devices, web, Windows desktop, remote synchronization

## Technology Partners



## Certified Solution Provider



Maximizer Mobile CRM	MaxMobile (Offline)	Wireless Web Access (Online)	MaxMobile Lite
<b>Supported Mobile Devices</b>			
BlackBerry® 7000 , 8000 & 9000 series including Curve, Pearl, Bold and Storm <sup>ii</sup>	✓		✓
Windows Mobile® Smartphones (HTC Touch, Palm Treo & others)	✓		✓
Windows Mobile® Phone Edition (Motorola Q, Samsung BlackJack & others)	✓		✓
<b>Supported Maximizer CRM Editions</b>			
Group, Professional & Enterprise Editions	✓		
Entrepreneur Edition			✓
<b>Supported CRM Features</b>			
Customers	✓		✓
Leads	✓	✓	
Notes	✓	✓	✓
Document Library		✓	
User-Defined-Fields	✓	✓	✓
Tasks & Calendar	✓	✓	✓
Sales Opportunities	✓	✓	
Customer Service Cases	✓	✓	
Call & SMS logging	✓	✓	
BlackBerry Address Book, Email <sup>iii</sup> & Phone Integration	✓		
Maps & Directions		✓	
Mobile Dashboards <sup>ii</sup>		✓	
Data storage: device or Secure Digital (SD) card	✓		
Wireless synchronization	✓		
USB synchronization	✓		✓
Wireless deployment via email <sup>ii</sup>	✓		

i. Using Maximizer Mobile CRM with BlackBerry® smartphones requires Maximizer CRM licenses, server, and MaxMobile for BlackBerry® licenses. Supports BlackBerry 7000 , 8000 & 9000 series including Curve, Pearl, Bold and Storm. Check <http://www.maximizer.com/support/maxcrm/prodsup/blackberry.html> for system requirements and supported devices.

ii. Included with Maximizer CRM 10.5 Freedom release.

iii. Company Library available through Wireless Web Access.

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

### 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.

Maximizer CRM helps small and medium-sized businesses maximize sales, customer satisfaction and profitability through increased business productivity and optimization 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

**Call: 1-800-804-6299**

**Email: [sales@maximizer.com](mailto:sales@maximizer.com)**

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