



# 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



 **BlackBerry**  
Alliance Member

## **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 smartphone, 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 smartphone 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>1</sup> in the field.

### **Increase productivity and optimize 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 smartphone.
- 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\* and phone enables you to immediately create new records, opportunities, cases and notes within MaxMobile<sup>1</sup>.
- Schedule meetings or required tasks directly from BlackBerry email to MaxMobile.
- Minimize 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 synchronize, directly onto the device.
- Access local data on your BlackBerry smartphone 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.
- Synchronize wirelessly<sup>iv</sup> from anywhere, or through a USB cable to maintain updated information on your BlackBerry smartphone 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.
- 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\*.

## 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<sup>v</sup> and reports accessed through your mobile web browser<sup>v</sup>.
- Make timely decisions and take necessary action by staying better informed with real-time information.

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

*ii. 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.*

*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.*

*v. Mobile dashboards available through Wireless Web Access.*

*\* Included with Maximizer CRM 10.5 Freedom release.*

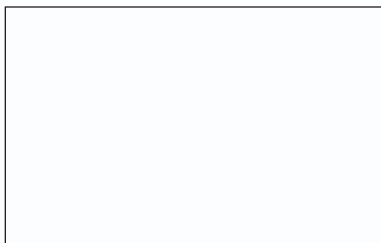
# Maximizer CRM 10.5 Features

- 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 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*	✓		✓
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* & Phone Integration	✓		
Maps & Directions		✓	
Mobile Dashboards*		✓	
Data storage: device or Secure Digital (SD) card	✓		
Wireless synchronization	✓		
USB synchronization	✓		✓
Wireless deployment via email*	✓		

### 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)**

**Web: [www.maximizer.com](http://www.maximizer.com)**

#### Americas

604-601-8000 phone  
604-601-8001 fax  
info@maximizer.com  
www.maximizer.com

#### Europe, Middle East, Africa

+44 (0) 1344 766900 phone  
+44 (0) 1344 766901 fax  
info@maximizer.co.uk  
www.maximizer.co.uk

#### Australia, New Zealand

+61 (0) 2 9957 2011 phone  
+61 (0) 2 9957 2711 fax  
info@maximizer.com.au  
www.maximizer.com.au

#### Asia

+(852) 2598 2888 phone  
+(852) 2598 2000 fax  
info@maximizer.com.hk  
www.maximizer.com.hk

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Simply Successful CRM