

Customer Success Story

"Today more than ever, people are seeking financial guidance to help them preserve and manage their wealth in turbulent times. Maximizer Mobile CRM gives us the confidence to work with clients directly, no matter where we are, by being able to access a complete customer history, associated documents and personal details on our BlackBerry smartphones."

Doug Roche,
RTR Advisory Group



Industry: Financial Services

Location: Edmonton, Alberta

Web: www.rtradvisory.com

Key Benefits

- ✓ Sales force efficiency
- ✓ Data transparency
- ✓ Mobile CRM which eliminates need for laptops on the road
- ✓ Reduces staff downtime and admin tasks

RTR Advisory Group

RTR Advisory Group Goes Mobile to Improve Customer Service and Boost Confidence

RTR Advisory is a financial advisory firm based in Edmonton. Partners in the firm design, implement and manage financial plans for high net worth incorporated professionals, small business owners and retirees. Services include financial planning, mortgages, insurance services, estate planning and portfolio management spanning legal, investment and tax services. The firm's four partners, subadvisors and administrative staff support over 3,000 clients.

Challenge

RTR had been a London Life agency before it became an independent agency. "When we switched from London Life to being on our own, we had to build a whole new client management system," said Doug Roche, Managing Partner at RTR. "We needed a team-oriented solution that would allow all of us to coordinate together to provide accurate and timely service to our clients." The firm implemented Maximizer CRM in 2006 and have been using it ever since.

"Maximizer CRM is a far better tool than the old system, which did not support Outlook email or calendar integration," describes Erica Brewster, Marketing Associate at RTR. "The financial services industry is all about client relationships. People are entrusting us with their money. They need to know that everyone and anyone they speak with here, understands who they are and can act on their requests."

Maximizer CRM allows RTR financial advisors and support professionals to work as a team to support clients. "Because we are a service-oriented firm, we go to our clients instead of making them come to us," says Roche. "Most of us had BlackBerry® smartphones and we managed contacts, calendars and emails from Maximizer CRM using its Outlook link, which was great. The problem was that we couldn't really see everything we needed to see about a particular client, nor could we make notes about what needed to get done that would integrate with the main Maximizer CRM database when we synchronized our BlackBerry data back up at the office. We realized we had only part of a full solution."

Solution

Recently, the firm implemented MaxMobile for BlackBerry® to extend the full power of Maximizer CRM to mobile staff members. "To get this up and running, we installed the new MaxMobile on each BlackBerry at the same time we upgraded to the latest version of Maximizer CRM, this only took one day to implement with the help of our IT and CRM consulting firm, Cencomp Systems Solutions," said Brewster.

About Maximizer Software

Maximizer Software delivers Customer Relationship Management (CRM) software and professional services to meet the needs, budgets and access requirements of entrepreneurs, small and medium businesses and divisions of large corporations. Simple, easy-to-use and affordable, Maximizer CRM enables companies to mobilize their workforces through all-access Web, Mobile and Desktop delivery methods. Easily configurable for organizations in any industry, Maximizer CRM optimizes sales processes, enhances marketing initiatives, and, improves customer service to ultimately boost productivity and revenue. Headquartered in Canada, with worldwide offices and business partners, Maximizer Software has sold over one million licenses to more than 120,000 customers since 1987.

Results

Increased Confidence

Now when partners make client calls, they can look up on their BlackBerry any notes about that person and what the latest instructions are for them. "This means that at the client's office or home, we have full knowledge of what we have done for them, including access to documents," said Roche. "We can also create tasks in the meeting that allow us to send instructions to people in the office for them to execute. MaxMobile is a real confidence builder — I don't have to guess what is happening with a client. I have up-to-the-minute information on exactly what we are doing for them. The nice thing about that is, it increases client confidence in our services as well. Now, everyone works within Maximizer CRM, whether mobile or in the office. The seamless integration from the mobile experience to the desktop makes teamwork possible no matter where we are," said Roche.

Improved Compliance

In the financial services industry compliance can be onerous. Each instruction received from a client whether by phone or by email must be logged for future audit purposes. "Audits can come up very quickly," says Roche. "Now we are able to respond rapidly because every order, every instruction and every document related to a client is stored in one spot and is readily accessible — in Maximizer CRM."

Maximizer CRM works as a one-stop client relationship and information filing system for all transactional instructions. When a representative enters instructions into MaxMobile, those instructions are synchronized back to the main Maximizer CRM database, to ensure a continuous record of client communication. If someone phones with an instruction, advisors can immediately alert staff as to what should happen. The entire workflow is "certified" because everyone works within Maximizer CRM all the time and tasks show up on the right people's desktops for completion.

Going Beyond the Business

"Another benefit is that the administrative staff feel like they know the clients even if they have never met them," said Brewster. "Clients really feel that the organization knows about me and cares about me. We track things like their favorite restaurant, hobbies, kids' names, and other personal details so that we can make a real human connection with our clients."

The Future

In the future, RTR will be doing more with the marketing and customer service modules that are built into Maximizer CRM. "We want to know the loop has been fully closed with regard to instructions. Using the customer service module we can see all open requests and be assured when they are closed that nothing has slipped through the cracks," says Roche. "It's just another level of insurance and confidence we can offer our clients. Today, with markets being so unreliable, increasing client confidence in our services provides us with a competitive advantage."

Maximizer Software
Simply Successful CRM

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