



*"I would say that Maximizer & BlackBerry is the right marriage of technology and information management. It's pre-packaged – we only needed to access Maximizer on the BlackBerry."*

- John Levingston, Sales Director  
SOE Software

Industry: Information Technology  
Location: WA  
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#### Key Benefits

- ✓ Gain data integrity and gather timely information on servicing clients
- ✓ Increase the efficiency and productivity of customer service technicians
- ✓ Build competitive advantage in the marketplace

## In-house Know-how Deploys Maximizer for Field Technicians

SOE Software Pty Ltd (SOESoft) is a proudly Australian owned and operated Information Technology Services and Software Development company working in trusted long term relationships with customers around the world. SOESoft offer innovative software products to enhance, streamline and reduce the operating costs of IT infrastructure.

SOESoft field technicians work at customer locations providing implementation and ongoing software maintenance and support. Having accurate metrics on software and service status is a key factor in both solid business analysis and positive customer image.

Since 2006, SOESoft began looking for a wireless solution to automate data from field technicians who implement software and service client IT infrastructure. Initially the BlackBerry Enterprise Server™, was deployed along with BlackBerry Wireless Handhelds™. However this only provided email and did not give SOESoft complete interaction with the technician. In November 2007 Maximizer released a Wireless Customer Relationship Management (CRM) solution for BlackBerrys that gave complete three way interaction with the customer, office and technician.

SOESoft developed specific tables and fields that Maximizer instantly deployed on each mobile. In addition to service records SOESoft was able to give each technician a complete history of all sales and technical records of the client. Technicians therefore had accurate data of contacts, phone numbers and address information. More importantly the technician had a complete customer liaison history.

#### Industry

Information Technology

#### Email Platform

Microsoft® Exchange

#### Applications Deployed

Maximizer CRM

#### Situation

SOESoft wanted to wirelessly collect accurate data to improve service efficiency, revenue and overall image to customers. They also wanted field technicians to wirelessly create their own service cases.

#### Organisation Profile

SOESoft are specialists in enterprise management software and SOE (Standard Operating Environment) solutions, with proven success in both small and large businesses. The SOESoft flagship product (RDMC) used in conjunction with the SOE product provides a complete end to end solution which is designed to reduce IT operating costs.

#### Results

BlackBerry was used to deploy a data integrity solution that was 1/12<sup>th</sup> the cost of other options.

## The Business Case

SOESoft had been considering ways to wirelessly enhance the way they gathered metrics on the service side of their business. A key criteria was that the solution needed to integrate with an existing, back-end accounting solution.

The company zeroed in on the following business goals to help target planning, which ultimately affected decisions about technical support, user involvement and deployment:

- Gain data integrity and gather timely information on servicing clients
- Increase the efficiency and productivity of customer service technicians
- Reduce infrastructure costs with improved accounting of work completed
- Build competitive advantage in the marketplace

“We didn’t have an effective way of getting information onto the BlackBerry,” says John Levingston Sales Director. “That meant delays and potential inaccuracies in updating our records.”

Unlike many field service organisations, which enter service calls through the call center, most of SOESoft’s service calls don’t originate in the call center; technicians create and dispatch their own cases since they already work onsite. That meant a new wireless solution had to help the technician open and close the case, enter the type of service, the nature of the work completed, and billable activities.

“Once the service case was closed, we needed it to go into a system so that reports on metrics could be pulled on that service activity”, says Mr Levingston. “Various levels of the business – from financial to product engineering – had to be able to look at these metrics to determine things like release history, response time, utilization, and product performance.”

## Why BlackBerry?

SOESoft investigated various devices, including PocketPC and wireless LAN solutions, before choosing BlackBerry. This analysis coincided with vendor negotiations about whether they would build a custom application or adapt a plug-and-play solution.

Mr Levingston received the blessing of the executive team when he proved that Maximizer on a BlackBerry met the majority of their business criteria, such as:

- 1/12<sup>th</sup> of the development and operational costs compared to other solutions
- Achieved 97% of business goals
- Provided a timely solution
- Full 1:1 customer service representative deployment
- Converged handheld that replaced cell phones and pagers
- Two way updates of customer records
- Less complex solution for end user

“I would say that Maximizer and BlackBerry are the right marriage of technology and information management” says Mr Levingston. “It’s all pre-packaged – we only needed to access Maximizer on the BlackBerry. “Other solutions only provide a small part of the customer record using a cradle connection. Maximizer and BlackBerry provide a complete CRM solution over a wireless network”.

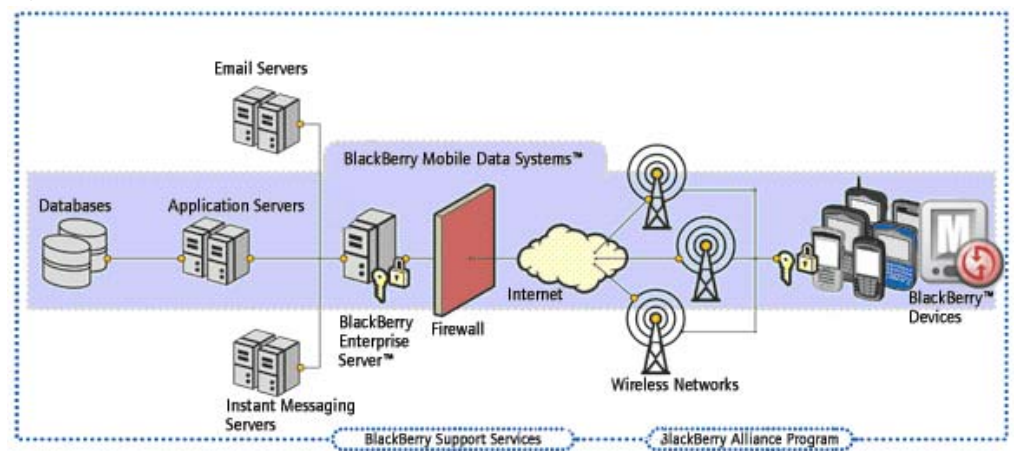
## Technical Challenges

Once business goals were assessed, SOESoft faced a decision common to companies who want to extend their BlackBerry solution; to build a custom versus an out-of-the-box solution. Knowing which way to proceed often depends on a number of factors, including the IT resources available, budget, the type of customized solution needed, and the compatibility of solutions already on the market.

SOESoft researched the extensive range of field force applications, however they found these expensive and designed for large outdated cumbersome handhelds. Since many focused on dispatching solutions, which was not the primary goal, they decided to work with Maximizer CRM to deliver the solution.

Once the company determined Maximizer was the right way to go, they looked at how to integrate with their accounting system to wirelessly access and update customer and financial data from the BlackBerry device. Very little technical development was required. SOESoft is able to use Maximizer's inbuilt customization tools to create specific tables and fields to capture data directly from the accounting system. Maximizer automatically transfers the customization into the mobile solution on the BlackBerry.

## System Architecture



## Putting the User First

At the heart of SOESoft is a team of highly skilled product developers, programmers and technical support staff. With a proven sales, marketing and administration team, they are committed to providing their customers with exceptional expertise, service and support.

With field technicians needing to act as their own service managers managing service cases throughout the lifecycle, an intuitive user experience was critical. With Maximizer on BlackBerry SOESoft no longer have to wait for the service technician to come into the office to get the timesheets or know what they have done with each customer.

The advantage of the Maximizer application was the ability to have the complete customer lifecycle on the Blackberry. The service technician is able to see everything about the customer from the first sales enquiry, to every case or conversation SOESoft had with the customer. This single source lifecycle of data is extremely valuable.

## About Maximizer Software

Maximizer Software is a leading provider of simple, accessible, customer relationship management (CRM) solutions, providing the best value for small and medium-sized businesses. Built on a web-based architecture, Maximizer CRM offers sales, marketing, and customer service users and managers their choice of access to customer information – through the desktop, web, or mobile device. Maximizer Software has sold more than one million licenses to over 120,000 customers, ranging in size from entrepreneurs to multi-national organizations, including: Siemens, Société Générale, HSBC, TD Securities, Lockheed Martin, Brian Tracy International, Fisher & Paykel Healthcare, Oxford University Press, and Cathay Pacific. Maximizer Software is a global business with offices and over 400 business partners in the Americas, Europe/Middle East/Africa and Asia Pacific. For more information, please visit: [www.maximizer.com.au](http://www.maximizer.com.au)

As an industry pioneer and experienced person of mobile and wireless, Mr Levingston knows that training is paramount to a successful deployment. That's why they engaged the Maximizer to provide comprehensive face-to-face user education.

## The Strengths of Partnerships

Technical projects are often only as successful as the partnerships that build them. The Maximizer project involved solid working relationships between the SOESoft and Maximizer.

"Through Maximizer offers our customers a CRM solution that extends the office. Maximizer is a global solution used by international organisations with over 400 partners around the globe offering significant knowledge and experience on CRM" says Peter Simons General Manager ANZ. "We have integrated Maximizer to most financial and ERP systems with freedom to customize the front end allowing the business to map their process and provide a complete vision of the customer".

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John Levingston, SOE Software Sales Director.

## Going Forward: Measuring the Successes

SOESoft has completed phase one of a two phase project and is ready to move to full deployment of Maximizer to all sales and service staff.

There have been several successes in the first phase of this project. SOESoft with Maximizer CRM provides a field force solution to automate data from BlackBerry devices to their administrative systems.

Some of their successes include:

- Met aggressive one-month timeframe
- Successfully integrated a mobile solution with Maximizer CRM
- Built knowledge transfer of customer financial data to the technician
- Built dynamic, supportive partnerships with RIM and Maximizer
- Data integrity of customer records
- Improved security of customer data
- Developed plan to extend the pilot group to a full deployment for sales and field technicians.

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**Maximizer Software**  
Simply Successful CRM