

# Case Study

## Financial Company Capitalizes on BlackBerry and Pyxis Mobile CRM Access



**Company:** Pioneer Investment Management Inc. is an innovator in the worldwide investment management industry, offering a broad range of investment management products to meet the needs of clients and investors for more than 75 years.

**Industry:** Financial

**Region:** Americas

**Company Size:** Large Enterprise

**Email Environment:** Microsoft® Exchange

**Type of Solution:** Sales Force Automation and CRM - accessing Epiphany eSales CRM system

**BlackBerry Partner Solution:** mWholesaler™ by Pyxis Mobile

**Business Challenge:** To offer mobile CRM access to its sales teams, Pioneer Investments wanted a solution that would gain immediate user acceptance and prove useful in the field.

**Solution:** The BlackBerry Enterprise Solution™ combined with Pyxis Mobile's mWholesaler was chosen by a test group. The choice was made based on the user-friendly features of both the BlackBerry® device and the mWholesaler application.

**Results:**

- Effectiveness in the field
- Better reporting helps with business analysis
- Less reliance on laptops
- More effective team relationships



## The Challenge: Deploy a Mobile CRM Solution that Delivers on its Promise

Pioneer Investments follows a traditional model for wholesaling its financial products: mobile sales people partner with internal counterparts to market Pioneer's products to large financial institutions who deal directly with customers. Teamwork, collaboration and access to good sales data are essential to sales success.

In the past, mobile reps were only able to access the company's Epiphany eSales CRM system on their laptops. That meant finding the time, while on-the-road, to boot up a laptop, connect it to a dial-up connection and search for customer information prior to meetings. They could also view the information in an offline format, but could not be sure it was the most current data without synching with the backend system.

Sales reps were relying heavily on their internal counterparts to look up information on-the-fly. Important facts were not always shared in a timely manner. There were also numerous phone calls between the team members during the day to catch up on details – creating an inefficient way of managing customer relationships.

When Pioneer Investments considered ways to improve the effectiveness of their sales team by offering them wireless access to CRM data, user acceptance drove their thinking. With busy financial wholesalers juggling multiple customers, the last thing the company wanted to do was add to their workload with complicated technology that would cause more frustrations than results.

The BlackBerry Enterprise Solution combined with Pyxis Mobile's mWholesaler application became the ideal platform to connect sales people to backend CRM data. By deploying mWholesaler by Pyxis Mobile on their BlackBerry devices, both the sales team and the IT group gained a robust, viable solution that met their sales automation challenge.

## Test Group Selects BlackBerry

From the start, Pioneer Investments put their users in the decision-making seat. A test group of people familiar with the eSales CRM system was established to review various solutions and offer feedback.

"Everyone liked BlackBerry for its ease of use, familiarity to users and short learning curve," says Tom Santaniello, Manager of Application Management. "It also spoke to our IT needs more closely. It is a platform, with its own security that allows you to extend its value with other applications."

The ability to travel light was also a selling point. BlackBerry gave sales people the option of leaving their laptops behind on business trips, since the majority of the data they need is addressed by BlackBerry devices, including the ability to read attachments.

"Having a test group in place from the start was very important," says Santaniello. "When we rolled out the BlackBerry solution out to other users, they knew that sales people had already tried it and worked through the bugs. That helped with universal user acceptance. We also learned that for a deployment like this to be successful, you have to move forward in steps so you give people time to digest the changes."

## Partner Profile:



### Company: *Pyxis Mobile*

- Provides wireless software that promotes asset growth for the investment industry
- mPlatform® solutions are used by mobile financial professionals to extend critical business data from internal enterprise systems to the mobile device of their choice

### Featured Product: mWholesaler

### Application Type: Sales Force Automation and CRM

### Business Value:

"One of the great advantages of having BlackBerry and mWholesaler available wirelessly is they help sales people maximize their time," says Santaniello. "If some of their appointments cancel, they can easily search through mWholesaler to see what other customers are in the area. It is an excellent way for them to recover what would be lost time."

~TOM SANTANIELLO, *Application Manager, Pioneer Investments*

*For more information, visit [www.pyxisit.com](http://www.pyxisit.com)*

## Mobile CRM Access

Sales people can access the resources of their Epiphany eSales database to:

- check recent sales tickets
- send thank you emails
- track campaign follow-ups and call rotations
- manage how they pursue new leads
- enter touch points, such as deadlines for meetings or mailings
- manage demographic information on representatives such as contact information, important personal details and reminders that build stronger customer relationships

The impact of having CRM data readily available has made mobile sales people more prepared when they go to meetings because they can now look up client histories. It has also changed the relationship with their internal counterparts – for the better.

"Our internal people are seeing a boost in productivity because they aren't on the phone all day," says Santaniello. "Since their mobile counterpart can now access their own data with BlackBerry devices, the internal sales people have more time to focus on managing customer relationships."

Reporting is also completed in a timely manner. Now, a sales rep can visit a client and note the results of the meeting immediately after it takes place. The lag time between customer visits and reports has diminished noticeably.



## Results

**Effectiveness in the Field:** Salespeople maximize their time by accessing CRM data that helps with decision-making in the field. Last minute cancellations no longer mean they have downtime, since they can search for other customers to visit in an area.

**Better Reporting Helps with Business Analysis:** Quicker reporting cycles ensure meeting results are recorded, providing better business intelligence for the company.

**Less Reliance on Laptops:** Salespeople can opt to travel lighter, because the BlackBerry device offers them everything they need to do business on the road.

**More Effective Team Relationships:** With customer information now available in a wireless format, phone time has been reduced between mobile and internal sales reps.

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