

LEADING FINANCIAL SERVICES COMPANY STREAMLINES INFORMATION AND IMPROVES CUSTOMER SERVICE USING BLACKBERRY SOLUTION

Industry

- Finance / Insurance

Region

- North America

Company Size

- Large Enterprise – 5,000 Employees

Solution

- BlackBerry® Enterprise Server
- CRM system access

IA Clarington Investments Inc. (IA Clarington), a subsidiary of Industrial Alliance Insurance and Financial Services Inc., markets a wide range of investment products, including mutual funds and segregated funds managed by leading portfolio advisors across Canada.

The Challenge

With a highly mobile external sales force comprised of remote users spread from coast-to-coast, IA Clarington found that it was becoming increasingly difficult to efficiently deliver key information to its front lines. The company needed a way to deliver current information to its external sales staff, like news items, marketing materials and current activities within their territories.

Since many of its staff work remotely, communication between the teams was also becoming inefficient and complex. Its sales staff would meet with an advisor but wouldn't be able to enter important information about the interaction into the CRM system until later in the day, meaning key details would often be forgotten.

The company needed an easy-to-implement, cost effective solution that would allow information to be shared more easily, free up administrative tasks and increase productivity. The end result would be more time for external sales staff to focus on efforts important to its client base.

The Solution

After the company implemented a highly successful web-based version of its Enterprise Information Management System (EIMS) on BlackBerry® smartphones in 2008, it launched a fully integrated BlackBerry application in 2011.

The development tools, available documentation and advice from BlackBerry staff convinced the company that it could develop the application in-house. "It's been very easy to develop on the BlackBerry platform," said George Ho, Vice-President of Information Systems and Technology at IA Clarington Investments Inc. "We haven't run into any challenges and the support that BlackBerry provides through its forums has been phenomenal."

BlackBerry's reputation for security and the ability to connect with the BlackBerry Enterprise Server were also important factors in IA Clarington's decision to employ a BlackBerry solution. "Part of the ease of the solution is that we didn't need to rethink how to connect a device securely to our network," said Ho. "Having the highly secure network already in place allowed us to concentrate on the usability side of things and focus on integrating the app with a variety of useful features and functions."

The innovative BlackBerry application has extended IA Clarington's CRM functionality to its mobile users by integrating with a number of native BlackBerry features, like Email, Calendar and GPS functionality. Sales staff can now view all of the daily interactions



"Integrating this BlackBerry solution has streamlined our flow of information, resulted in more accurate and timely entries into our CRM and ultimately led to better customer service."

George Ho

Vice-President of Information Systems and Technology at IA Clarington Investments Inc.

between the company and clients within their territory, leverage the Calendar functionality to book client appointments directly into the CRM system and locate clients near their current location.

The company can also make its continuously-updated marketing materials, news items and short video segments available directly on the application. New items are downloaded to the device and users can now view them while on the road through either the built-in BlackBerry browser or media player.

IA Clarington Investments Inc.'s Benefits

This integrated solution has streamlined IA Clarington's flow of information between salespeople, clients and regional offices. It allows sales people to work from the road instead of having to save everything on their desktop and re-enter the information at a later time, eliminating a substantial amount of administrative work every week.

Key information is now entered into the mobile CRM system immediately following meetings with advisors. As a result, real-time data entry has become more accurate and more robust, with an approximate 21% increase in client interactions captured into the CRM system.

"It's important to us because the relationships that we have with the advisors are vital to our business," said Ho. "The advisor's time is extremely valuable, so it's important to capture as much as we possibly can during our meetings with them."

With a high level of front-end functionality and integration with BlackBerry features, the company has also seen a positive response in terms of employee engagement. "Employees can see that we're providing them with useful tools," said Ho. "Since we were able to focus on functionality, our employees enjoy using the features and consider them leading edge."

Key Benefits

- Higher number of client interactions captured into CRM system
- Increase in overall sales productivity
- Greater mobility for salespeople
- Ability to push internal company information directly to salespeople

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