

CRM Expert Advisor White Paper

# How 5 Companies Increased Sales and Improved Productivity using CRM Software



**Maximizer Software**  
Simply Successful **CRM**

## Contents

Implementing Best Practices for CRM to Solve Business Challenges .....	3
Standardizing Sales Processes at W&O Supply Increases Productivity .....	4
Mathusek Increases Accuracy of Sales Forecast Using CRM.....	6
ScotiaMcLeod Upgrades to CRM Solution and Increases Value of Relationships .....	8
StemCell's \$20,000 CRM Investment Yields 500 per cent ROI.....	9
CRM Improves Dolphin Software's Sales Processes and Leads to Improved Sales.....	11
Conclusion .....	12
Next Steps .....	14

## How 5 Companies Increased Sales and Improved Productivity using CRM Software

### Implementing Best Practices for CRM to Solve Business Challenges

The role of the sales executive in most small and medium-sized businesses (SMBs) is changing. Faced with intense pressure to do more with less, salespeople live in a near constant state of uncertainty, constantly asking “Will this deal close, when will it close and for how much?”

However, to help salespeople stay competitive new technology is available to assist them in their selling situations. In general, more salespeople should now have access to this technology as price points have fallen, particularly in the SMB space where technology solutions with enterprise-class capabilities are being developed at prices SMB’s can afford. Using technology to improve the way a business interacts with its customers is critical to the success of just about every small- and medium-sized business (SMB) in North America. Customers, after all, are any company’s most important asset. With an effective customer relationship management (CRM) program in place, these relationships can be appropriately managed to maximize revenue from the customer while improving customer satisfaction and keeping operational costs low.

CRM is about helping businesses manage customer relationships in an organized way. It’s also about creating relationships that yield maximum value over the entire customer relationship by selling, marketing and caring for customers based on their specific needs and preferences. CRM can help companies build more profitable, intimate relationships, increase sales force productivity to follow-up on hot leads, make more accurate sales forecasts, automate sales processes, and monitor sales rep productivity. This can lead to cost savings, increased market share, and improved sales.

Companies in a variety of industries have redefined their sales processes with CRM software tools. By adopting Maximizer Enterprise, a proven and affordable CRM solution from Maximizer Software, five companies (listed to the left) were able to achieve their sales objectives, and in turn, increase revenue.

Each of these customer success stories highlights the specific challenges these companies faced prior to their CRM implementation and then clearly states the significant benefits and results achieved as a result of using Maximizer Enterprise.

The commitment by each of these companies to improving sales processes has resulted in measurable improvements, from reducing the sales cycle and lowering the cost of sales, to increasing their teams’ ability to sell. As a result, these companies have increased their ability to compete for and win new business and they are all building profitable customer relationships in the process.

## Standardizing Sales Processes at W&O Supply Increases Productivity

### Introduction

W&O Supply was founded in 1975 and is the largest marine pipe supplier in the United States. W&O Supply's customer base represents all aspects of the maritime industry including the US Navy, commercial shipping companies, barge owners, cruise companies, offshore rigs and shipyards all across North America. W&O Supply uses a customer relationship management system from Maximizer Software to ensure all thirteen branch offices across the United States and one international location in Belgium stay connected with access to a 360-degree view of each customer as well as new business opportunities.

### The Challenge

When W&O Supply was acquired by PON Holdings, a multi-billion dollar, privately held company based in the Netherlands, expansion followed and the company was challenged with connecting a mobile workforce of 180+ people, a third of whom were engaged in some sales activities. Standardizing sales processes across offices was a top priority for Jack Guidry, W&O Supply's Vice President and National Sales Manager.

"As we grow our business model throughout the world, it is extremely important that all of our efforts to maintain existing customers and develop new customers are coordinated in a standardized way. Managing growth while increasing productivity can be challenging," says Guidry. "We needed all departments, including sales, distribution, accounting, technology and management, following best practices procedures as they relate to customer relationships, particularly in the areas of data organization, project tracking, and reporting of key information."

### The Maximizer Enterprise Solution

Guidry examined multiple CRM, project management and accounting systems, looking for one that would provide a consolidated view of opportunities and accounts and more accurate forecasting. The system needed to be customizable, yet not so complex that it lacked end-user friendliness, and it needed to be scalable to accommodate future expansion within the organization.

The off-the-shelf capabilities of Maximizer Enterprise appealed to Guidry as a starting point for W&O Supply's CRM project.

"We wanted a system that was intuitive and as easy to use as possible. Maximizer Enterprise appealed to us because all the information centers around the company, and we liked the list-based format that is unique to Maximizer Enterprise. Maximizer Enterprise also has the ability to be easily customized, which we plan on utilizing in the near future," said Guidry.

## Implementation

To ensure the CRM rollout at W&O Supply went smoothly, Guidry contacted Wintec, a Certified Maximizer Software Business Partner in New York. Wintec ensured Maximizer Enterprise was configured in a way that matched the sales processes Guidry wanted to put in place. Within only a few weeks Maximizer Enterprise was being used daily as the managers and sales reps had a common language with which to describe customers, make reports and track opportunities.

“Jack outlined a few key areas where he felt Maximizer Enterprise would be of benefit, including call monitoring and response, project tracking, and goal-focused selling. We started by organizing key data within Maximizer Enterprise. Unlike the loosely referenced data that crossed the company via e-mail, Maximizer Enterprise linked data in an intuitive way. Customer call reports are stored in the same location as the address, phone numbers and contact names. Unique custom fields are linked directly to this data, as are scheduled events, such as calendar or to-do list items. In this manner, the data in Maximizer Enterprise is easier to work with, better indexed and provides a more complete picture for management feedback on a particular matter or question.”

## Results

W&O Supply has increased both the quantity and quality of call monitoring, created comprehensive customer profiles, and they are using the Opportunity Management System (OMS) within Maximizer Enterprise to facilitate the tracking and closing of long-term sales opportunities by tracking multiple client projects and assigning a close date and revenue to each deal.

“The biggest benefit from using Maximizer Enterprise is that each time we interact with a customer we can access a complete customer view. With this knowledge we can provide much better customer service and manage the customer relationship more effectively.”

- Improved information about the sales team and sales processes
- Protection of customer data and intellectual property
- Improved tracking of call volume
- Improved sales methodology
- Employee retention

## Mathusek Increases Accuracy of Sales Forecast Using CRM

When it comes to basketball, many NCAA teams have at least one thing in common with the NBA's New Jersey Nets - and that's the floor on which they play. Seton Hall University Pirates, St. John's University Red Storm, which were installed by Mathusek Inc., one of North America's largest installers of world-class performance sports courts and sports floors. Since its inception 40 years ago, the Company has installed hundreds of gym floors, including the installation of the main gym for the University of Lima in Peru, and the sports floors of Reebok's World Headquarters in Canton, MA.

As Mathusek grew, the Company needed a more efficient way to track and manage projects so they could focus on increasing sales by putting more proposals on desks of their prospects.

### The Challenge

The sales team at Mathusek Inc. was struggling to keep new projects and existing customer records organized. There was no central database where all of the customer information resided and there were many duplicate records across each of these databases. This made it impossible to share important customer information throughout the organization in a timely and reliable way. It also made it difficult for sales managers at Mathusek Inc. to pull together and analyze sales forecasts and sales call reports.

Another challenge facing Mathusek Inc. was a lack of technology resources. Mathusek doesn't have a dedicated IT team so whatever new IT system was installed had to be reliable, easy to use and simple to maintain.

### The Maximizer Enterprise Solution

After researching products from SalesLogix, Siebel and GoldMine, Mathusek determined that Maximizer Enterprise provided a much easier and faster installation than competing products. Mathusek saw that Maximizer Enterprise could be easily scaled to accommodate organizational growth. Mathusek needed a powerful sales tool that his sales team would want to use and would use often, and Maximizer Enterprise would let his sales managers keep on top of new opportunities, whether in the office or on the road.

### The Implementation

Mathusek Inc. selected the Wintec Group, a Maximizer Software Certified Solution Provider, to customize and implement Maximizer Enterprise for their organization, as well as train all 20 users on the product.

At the start of the business relationship, Wintec spent a few days learning Mathusek Inc.'s business processes, including customer service, project documentation, and reporting methods. Consultants at Wintec met with each customer-facing staff member

at Mathusek, including sales, marketing, customer service, accounting and senior management.

“It was important to spend time with each of Mathusek Inc.’s employees to ensure their new Maximizer Enterprise CRM system would meet the needs of each user throughout the Company,” said Liz Wolfe, President, Wintec Group.

Wintec required approximately two weeks to implement and customize Maximizer Enterprise for Mathusek Inc. In addition to the out-of-the-box sales, marketing and customer service modules in Maximizer Enterprise, Wintec built an additional module to manage the equipment installed at client sites. This enabled Mathusek Inc.’s employees to manage their technical resources and client service requests with associated job sheets, expense reports, and billing verification. This made it easier for customer-facing employees to see all of the critical information they needed on installations and clients in a single view, plus the management reports provided a much more comprehensive insight into company operations. Mathusek Inc. now has a complete service history of each sports court installed in the field.

“Because we don’t have an IT team at Mathusek Inc we appreciated the support Wintec gave us in implementing and customizing Maximizer Enterprise and then training our employees on how to use it effectively. Their experience with Maximizer Enterprise was very valuable,” said Mathusek. “Now our sales and service operations are integrated within Maximizer Enterprise. The system provides reliable synchronization of information to our reps and it’s easy for them to see the significant contribution Maximizer Enterprise is making to our business. This means they use it more often and we’re now exploring additional opportunities to leverage some of the other capabilities Maximizer Enterprise has to offer.”

## **The Results**

- Revenues grew from \$1.8 million in 1991 to more than \$8 million today
- Increase in productivity led to 75% increase in staffing levels for new projects
- Service response times improved by 50%
- New leads are followed up more quickly
- Internal communications continues to improve
- Reports can be created with key performance indicators for more accurate sales forecasts

## ScotiaMcLeod Upgrades to CRM Solution and Increases Value of Relationships

ScotiaMcLeod is the investment arm of Scotiabank, one of Canada's largest financial organizations with over \$280 billion in assets. According to Chris Carter, Associate Director and Branch Manager for ScotiaMcLeod's North Vancouver office, the financial services sector is a people-driven business where customer service and intimate relationships is critical to success. Carter wanted the ability to turn every customer interaction into an opportunity to provide additional services to his clients. He wanted to promote a professional image and customer-oriented business philosophy at his branch as a way of putting clients at ease and attracting prospective clients who are searching for financial advice.

### The Challenge

Carter knew he needed to be proactive in order to keep existing clients happy and to build his base of new customers. Since his team of financial advisers contacts clients often and tracks accounts daily, he also knew that he would need a more effective CRM solution. "A client may be worth up to \$50,000 for professional consulting and ongoing management fees," says Carter. "If customers are not tracked and followed up immediately we could easily lose them to another financial institution."

### The Maximizer Solution

ScotiaMcLeod had some experience with Maximizer's contact manager and this branch wanted to explore Maximizer Software's full range of CRM products and services in order to keep their competitive edge.

### The Implementation

To help his team navigate through the various CRM vendors and product offerings, Chris searched for a local CRM specialist who would understand and help solve his CRM challenges. Chris found his match in On-line CRM Solutions, a Certified Maximizer Software Business Partner. The team at On-line CRM Solutions assured Chris they would work with him to ensure Maximizer Enterprise was customized to meet the unique challenges of his financial services firm.

"When the experts at On-line CRM Solutions told us that features like email marketing and CAN-SPAM compliance were available in Maximizer Enterprise right out of the box, we decided to upgrade to the complete CRM system right away," says Chris.

"It was easy for the team at Scotia McLeod to migrate from Maximizer to Maximizer Enterprise. The user-friendly interface is similar in both versions so they didn't have to learn a whole new system. Plus, they were able to transfer all of their critical data into Maximizer Enterprise without having to re-type data. This saved them even more time," said Rod Milne, President, On-line CRM Solutions.

On-line CRM Solutions automated many of Scotia McLeod's everyday tasks using Maximizer Enterprise including scheduling outbound calls, recording contacts, and managing literature fulfillment. On-line CRM Solutions also set up Maximizer Enterprise to manage and route leads, automate email campaigns, capture leads off the Web site, and segment and track customers. All of this configuration, customization, testing and deployment took place under two months. In addition, Scotia McLeod had selected Maximizer Enterprise for its ease of use so training requirements were minimal, meaning the Company could start using their new CRM solution right away.

## **The Results**

- Improved quality of customer service
- Enhanced ability to create comprehensive customer profiles
- Decrease in direct mail costs
- Increased productivity of financial advisors by automating lead management, email campaigns, and literature fulfillment
- Expanded reports including snapshots of sales pipeline

## **StemCell's \$20,000 CRM Investment Yields 500 per cent ROI**

StemCell Technologies, Inc, didn't waste any time figuring out that a 500 per cent return on a \$20,000 customer relationship management investment made a lot of sense. The Vancouver-based biotechnology company develops and sells specialized cell culture media to a global customer base that includes professors and researchers at universities, hospitals and biotech companies. The sales, marketing and technical support teams in Canada, the U.S., the U.K. and France, are using Maximizer Enterprise to track customers, prospects and leads.

## **The Challenge**

As the Company's client base grew and its sales team expanded globally, StemCell's sales force often worked independently of one another. This created challenges for regional managers who didn't have visibility into what was going on with customers and prospects. What StemCell needed was a way of centralizing account information, plus lead and information distribution for its growing sales force of remote field representatives.

## **The Maximizer Enterprise Solution**

StemCell selected Maximizer Enterprise for its out-of-the-box integration, superior account and lead management functionality, remote synchronization, reporting tools and integration with accounting; and per-user pricing which would reduce their up-front costs and accommodate the quick growth of their remote sales force.

## **The Implementation**

StemCell teamed with two Certified Maximizer Business Partners, CRM Consulting and Alpha Pacific Technologies to deploy Maximizer Enterprise throughout their organization. The first step of the implementation involved a test installation with thirty employees and a database with over 60,000 contact records. These records were imported into Maximizer Enterprise in just a few hours and staff training, as well as updating all of the remote sites, took less than one month.

CRM Consulting and Alpha Pacific Technologies also helped StemCell create and configure dozens of user-defined fields (UDF's). The sales team requested these as a way of profiling prospect and customer records in a single snapshot. The Business Partners were also able to integrate Maximizer Enterprise into StemCell's accounting, ordering, and inventory management systems. Now, StemCell's sales reps have access to all of the pertinent information for each account - part and order numbers, purchase dates, shipment notes and more.

To further maximize their CRM investment, StemCell implemented Crystal Reports to create customized reports that would give managers insight into the current status of their field sales activities and customer inquiries. They set up Crystal Reports to automatically deliver real-time status reports that displayed key metrics on sales, marketing, and technical support activities.

Cam Buschel, Stemcell's Sales & Marketing Analyst, estimates the total project investment, including software, consulting and maintenance, will run in the neighborhood of \$20,000. StemCell is already predicting a five-fold ROI, at the very least.

"Maximizer Enterprise has become a one-stop-shop for our sales reps to see all of the critical information they need to intelligently and successfully service an account," says Knowles. "It gives us the market intelligence we need to respond to customer and market demands before our competition does."

## **The Results**

- \$20,000 investment in CRM yields a 500 per cent ROI
- Staff training and updating remote sites took less than one month
- Global sales team uses Maximizer Enterprise to track activity on its 60,000 customers and prospects
- Allows for self-service report generation from the sales force

## CRM Improves Dolphin Software's Sales Processes and Leads to Improved Sales

Dolphin Software, Inc., a privately owned software company in Lake Oswego, Oregon, is now a leading provider of data-management tools for a wide range of businesses that handle, store and use hazardous chemicals. Their relationship with Maximizer Software began in 1994 as their client acquisition activities were taking off. Their sales force started getting extremely busy and the demands on their time and resources increased.

### The Challenge

As the demand for Dolphin Software's products and services grew, so did the needs of its sales and customer service teams, including the ability to accurately and efficiently track prospects and sales opportunities, and customer accounts. Sales Managers at Dolphin Software, also desperately wanted the ability to access all of the Company's customer records through a dashboard and get a quick snapshot of what was going on with any account at any given time. They needed the tools to shorten the sale cycle, gain insight into each sale opportunity and its status in the pipeline. In addition, the Company needed a solution with which they could implement the sales model that was already propelling them to success.

### The Maximizer Enterprise Solution

"We looked at many CRM software applications and even one popular hosted solution, and we just felt they weren't applicable," recalls Deb Sepich, Vice President & Chief Operating Officer, Dolphin Software. "Maximizer Software, on the other hand, was very competitive with its pricing and we liked how willing they were to work with us to help us solve our business objectives. They treated us like we were their only customer and the training they provided was the best we've ever had."

In addition to these low costs, it was the sheer number of benefits of using Maximizer Enterprise that caught the eye of the CRM steering committee at Dolphin Software. "We felt Maximizer Software had the ability to continue serving our needs at the level we were at and it could continue doing so as our sales volume increased," said Sepich.

The product's easy-to-use interface was another plus. Given that so many of Dolphin's employees had used Maximizer as a contact manager, the decision to move to Maximizer Enterprise was a natural choice.

"We wanted a user interface and functionality that our people would adopt and use, rather than something they would find intimidating," Sepich continued. "We believed it was wise to buy a solution that was easy to install and configure, and provided the right level of functionality we needed. We knew we didn't want the over-bloated functionality that some of the larger vendors are trying to pass along to customers in the small to mid-market."

## The Implementation

Dolphin Software decided to implement Maximizer Enterprise first with a few basic configurations to capture customer data and follow existing business processes. Then, when the sales and customer service and support departments gained a better understanding of the full capabilities of Maximizer Enterprise, they could more accurately determine which customizations would be most beneficial. This strategy also helped keep implementation timelines and costs to an absolute minimum.

“We kept expanding and after a few months the Maximizer Enterprise user base had grown to include users in each of our departments, including sales, accounting, customer service and support, human resources, and programming and production,” said Sepich. “We now have fifty Maximizer Enterprise users and they definitely have a solid understanding of where they want their Maximizer Software system to take them, and the specific value of these customizations.”

“Maximizer Software helped put the Dolphin Software’s sales team on the same page by organizing the way they communicate. Maximizer Enterprise is adaptable enough to fit Dolphin Software’s language and their way of doing business.

“We now have a range of reports to meet the needs of our entire team,” Sepich added. “For example, we know that when a deal reaches a certain stage, a sales engineer needs to get involved. They can look to see what deals in their region are reaching that stage and plan for the anticipated workload.”

## The Results

- Increased average sale value by about 10%
- More deals are now closed faster
- Each department has been organized using a single system
- Account histories can be accessed quickly

## Conclusions

As a result of their successful CRM implementations, W&O Supply, Mathusek Inc., Scotia McLeod, StemCell Technologies, and Dolphin Software were all able to improve their customer facing business processes, help their employees work more efficiently, and increase revenues. As highlighted in each of these customer examples, successful CRM implementations require a thorough understanding of the specific business requirements needed for success, as well as clearly defined project goals. Furthermore, if the CRM project is to be a success and lead to increased revenues, companies need to set measurable goals upfront, get executive buy-in from the management team to see the project through to completion, as well as ensuring employees fully understand how the software will make it easier for them to do their jobs and meet their performance objectives.

According to Sheryl Kingstone, the Yankee Group's Program Manager for CRM Strategies, "Companies who want an immediate return on their CRM investment should consider Maximizer Enterprise, as their products are helping customers increase productivity, generate revenues and improve customer satisfaction, loyalty, and retention....Maximizer Software's customers kept their overall Total Cost of Ownership lower through easier configuration changes, fewer infrastructure purchases and high-priced consultants." The Yankee Group's report entitled "The Financial Realities of CRM: A Guide to Best Practices, TCO and ROI" provides a framework for companies embarking on a CRM solution. (This research report is available at the following link: <http://www.maximizer.com/solutions/maxent/wp.html>).

By keeping these customer successes in mind, and by adopting proven and affordable CRM technology that can improve business processes and productivity, organization can improve their ability to sell and stay competitive, which will lead to an increase in revenue and profitability.

## 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](http://www.maximizer.com).

## Contact Maximizer Software

Americas (Headquarters)  
1-800-804-6299  
[www.maximizer.com](http://www.maximizer.com)

Europe, Middle East, Africa  
+ 44-1344-766900  
[www.maximizer.co.uk](http://www.maximizer.co.uk)

Australia/New Zealand  
+61-(0)-2-9957-2011  
[www.maximizer.com.au](http://www.maximizer.com.au)

Asia  
+ (852) 2598 2888  
[www.maximizer.com.hk](http://www.maximizer.com.hk)  
[www.maximizer.com.cn](http://www.maximizer.com.cn)