Case Study
Maximizer CRM helps Source Business Leads to help others

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>
> *Monica McGeary, Owner, Source Business Leads*

SOURCE BUSINESS LEADS **"**

Key benefits:

- Maximum flexibility to adapt to the business needs and maximize efficiency

- Seamless integration with Microsoft Excel for quick and accurate reports

- Streamlined appointment settings and tasks, for smoother project management

- Separate databases to handle projects for each customer

- Ability to save documents and emails against record, to keep track of communications without compromising the security of the documents.

An experienced player

Catering to micro and small and medium enterprises (SMEs), Source Business Leads has been in the field of outsourced business development services for over 14 years. The team of six is led by company owner Monica McGeary and while small, it delivers a range of powerful services, including Business to Business (B2B) lead generation campaigns, data insight, market research and tele-coaching.

"We proactively engage companies using various selling channels, including phone, SMS, email and face-to-face appointments. This enables our clients to retrieve accurate facts and details behind decisions that drive positive change. The ultimate goal with any campaign is to secure the opportunity for our clients to create a sale and grow their businesses", explains McGeary.

Customer Relationship Management (CRM) solutions have always been embedded at the heart of Source Business Leads' operations, with the company having one core CRM system in use internally and working with several clients' CRM remotely; this gave McGeary a good insight into the functionality and capabilities of CRM. As a third-party sales and business development support team, Source Business Leads required a solution that catered not only for their own needs as an enterprise, but also for the needs of their clients. The decision to implement Maximizer CRM was made in late 2011, with the original implementation completed in January 2012 and a subsequent upgrade to Maximizer CRM 12 Summer 2013 Group Edition made the following year.

The hurdle of complexity

Prior to the implementation of Maximizer CRM, the company had been using a popular platform, but found it ill-suited to the company's specific needs. "There were a number of shortcomings with the database", McGeary tells. "Foremost, it required a high level of

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user competence and even when that requirement was met, it was still very time consuming to apply all the layers of logic to pull even simple information from the system."

"We share our data and progress with clients on an everyday basis and all the attachments sent out via email were live server files. As a result, if a folder location was changed or an email was deleted from the server, it would automatically wipe it out from the database." A further frustration was the difficulty of gaining snapshots at different stages of each campaign.

The team was also struggling to maintain efficiency when out of the office, as the existing CRM wasn't accessible via the internet: "We had to use VPN (Virtual Private Network), which meant huge downloads. Whatever we had to do, it tended to be troublesome and time-consuming using the old system".

Increasing efficiency and reducing the complexity of the CRM was the main objective; after 10 years of having to adapt to "work-arounds" to get what they needed out of a system, the team required an easier, less time consuming approach to accessing the information they needed to share. "I had been working with CRMs for a long time and knew exactly what I was after. I wanted something easy to use and easy to customise, alongside separate databases for each client. These also had to be flexible and customisable, as our clients' businesses vary, and there also had to be a lot of leeway as to what could be done at user level."

A perfectly tailored solution

After McGeary began her research, she quickly came to the realisation that most CRM solutions were designed with big, corporate organisations in mind. Her company needed a solution that would be cost-effective, yet powerful and Maximizer CRM seemed to fit the bill. In McGeary's words, "It gives me a lot more, but at the same or better price point."

She continues: "We definitely achieved our main goal of improving efficiency with Maximizer. For example, it now takes half the time to prepare reports, which really boosts productivity. The emailing issues were also ironed out thanks to Maximizer - the databases are clear and easy to use, and offer seamless integration with Microsoft Excel."

With so much experience under her belt, McGeary is well-positioned to advise others on CRM issues and in June 2013, she attended a seminar in Belfast, where she talked about how to choose the right solution.

"The most important thing I wanted to share with others is that defining your company's needs at the very beginning is key. Specify your requirements to the provider and prepare a document that states exactly what will be delivered. And beware of any 'download yourself and start using today' options: you will never become a proficient user without proper training.

"However smooth it may be, implementation of a new system always involves some element of hassle. Brace yourself and see it through and you will be left with a tailored tool that does exactly what you need it to do."

Productivity on the up

Maximizer now streamlines and manages all the appointment setting, telemarketing, lead development and various projects the company undertakes for its clients.

"We have our core contacts database, which we use for our business development needs like automated email campaigns, and there are also separate databases that sit within Maximizer for each individual client. Given that over the years we've worked with hundreds of businesses, it's easy to imagine how vast these are. This sheer volume means that everything has to work perfectly and Maximizer helps us do exactly that."

McGeary has no doubts that efficiency across the organisation has greatly improved since the implementation of Maximizer, with the company now able to deliver an increased service to clients within a particular timeframe or budget. Maximizer has continuously met McGeary's expectations and she is happy to recommend it to others. "In fact, after my presentation last year, I met a windows manufacturer company owner who told me that he decided to go for Maximizer. He's using it much more heavily than we do, with many more licences and more functions, and he's very happy with it. It's an extremely flexible product. I wouldn't be surprised at all if next year you do a case study with their company!" McGeary laughs.

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 enterprises.

Simple, easy to use and affordable, Maximizer CRM enables companies to mobilise their workforces through all-access web, smart phone, tablet and desktop delivery methods.

Easily configurable for organisations in any industry, Maximizer CRM optimises sales processes, enhances marketing initiatives and improves customer service to ultimately boost productivity and revenue.

With headquarters in Canada and offices and business partners worldwide, Maximizer Software has sold over one million licenses to more than 120,000 customers since 1987.

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Maximizer CRM

Maximizer CRM helps small and medium-sized businesses maximize their marketing, sales, customer satisfaction capabilities and enhance their productivity and efficiency through the optimisation of what resources they have.

Why Maximizer CRM?

- Simple & quick to deploy, use and maintain
- Flexible access options through web, desktop and mobile devices
- Value for money with low total cost of ownership and monthly subscription models
- Expertise as a leader in pioneering CRM development, with more than 20 years experience.

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