

Miskimmin Taylor reap business benefits with 'tailored' Maximizer CRM solution



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Debbie Reid, Office Manager, Miskimmin Taylor



Key benefits:

- Seamless implementation
- Precisely tailored solution to meet specific needs
- Time-saving statistical reporting, diary management and appointment setting
- Improved access to information
- Cost-saving mail merge and expert functions
- Easily integrated with Microsoft Word® and Outlook®.

About Miskimmin Taylor

Founded by Mark Miskimmin and Colin Taylor, financial advice specialist, Miskimmin Taylor, has been providing independent financial services to individuals and companies for over two decades.

Miskimmin Taylor offer an extensive range of financial and professional support services to a network of over 5,000 clients from their base in Northern Ireland. Their core business is based on building successful, trusted, long-term relationships with clients in order to make a real financial difference to their lives.

As the business grew, it became clear that Miskimmin Taylor needed a more advanced and intuitive CRM solution, as their existing system simply was not fulfilling the company's needs. Office Manager, Debbie Reid, is responsible for the efficient running of the office and her duties include all customer communications, marketing,

lead generation, follow-up enquiries and event management, as well as procurement and hospitality. She discusses the reasons the company chose Maximizer CRM, the ease of implementation, and improvements since to its core business functions.

The ease of implementation and solution installed

Having formerly used an alternative CRM system that was falling far short of satisfying its business needs, Miskimmin Taylor decided Maximizer was a better fit and moved to implement Maximizer Entrepreneur Version 12 in March 2013. Ms Reid explains: *"Prior to our adoption of Maximizer, our CRM system wasn't meeting our requirements for appointment setting and reporting. The former solution also didn't provide diary management, which is a crucial aspect of our business and ultimately,*

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resulted in our decision to look for a new CRM.”

The fact that Maximizer CRM could be readily ‘tailored’ to precisely meet Miskimmin Taylor’s specific situation was a deciding factor in choosing the solution over others.

Ms Reid adds: *“We knew that a more sophisticated, yet user friendly, solution was needed in order for us to deliver top-class service to our clients and maximize growth potential. Maximizer filled these requirements and has supported our business moving forward ever since.”*

Since the implementation, Ms Reid has been delighted with the seamless transition: *“From setting it up, there was minimal training required, so there was little or no downtime, and the system is very user-friendly. We have our solution integrated with Microsoft Word and Outlook and again, there were no issues in implementing this.”*

Core business functions improved

Ms Reid notes that the business benefits of using Maximizer have been “significant”. Whilst Ms Reid describes a big improvement in efficiency and productivity, she specifically focuses on core functions that have made a big difference: *“The mail merge and export functions are saving our business both time and money. Our planning and updating of data has improved, as has the ease of access to relevant information.”*

“We have also dramatically reduced the need to produce or use spreadsheets as all information is now reported on one user-friendly dashboard,” says Reid, in outlining the improvements in efficiency since the implementation.

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A business changing solution

When discussing the overall impact of using Maximizer CRM, Ms Reid says the implementation has improved business processes across the board, which in turn has led to the freeing up of valuable time for activities aimed at extending profits.

“Since implementation, our employees have really enjoyed using Maximizer’s powerful CRM solution. Moving forward we are continually reviewing and looking at upgrade options, which I am sure we will do in the not too distant future.”

Reid also praises the relationship with Niall McCaffrey, Managing Director of Maximizer Certified Solution Provider, ProAptivity, which implemented the system at Miskimmin Taylor: *“Niall has always been the ultimate professional. He is always available, very knowledgeable, courteous and friendly. He truly is a fantastic advocate for Maximizer.”*





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.

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