



## Driving an Entire Business Using Maximizer CRM

*"All the required business processes were automated and in place before we started trading. This allowed both management and staff to focus purely on growing the business rather than being concerned with divisional infrastructure." - Paul Martin, Managing Director, Excel in Business*

### Company Information

Industry  
Software

Location  
London, United Kingdom

No of users  
6

Product  
Maximizer CRM10

### Providing excellence to business

Excel in Business is a virtual software and services business founded in 2006. The company authors Excel based management reporting software for mid-market accounting and CRM applications and is the UK's number one provider of "out of the box" reporting applications. The Excel in Business focus is on providing innovative management reporting solutions through its A La Carte software suite and associated virtual consulting services.

### Preparing to succeed

Being a totally virtual operation, Excel in Business needed to ensure all business processes were automated and in place before it even started to trade.

For this, the company required a comprehensive Customer Relationship Management (CRM) system that could automate everything needed to run the business, including customer and partner records with full historical information, sales forecasting and software support capability. In addition, all sales lead information uploaded to the system through customised website forms needed to be captured and automatically fed back to staff through the CRM database.

As a new company, it was vitally important for Excel in Business that the system could be easily customised to accommodate any possible changes needed as its business matured, to such an extent that even user defined fields had to be easy to amend by any member of the team.

Lead tracking and customer database enquiries at Excel in Business can be complex, with many elements relating to running a multi tiered business of customer history and business partner adoption and retention. It was therefore essential for the chosen CRM solution to be able to cope with this by offering straightforward usability that could provide the data requested quickly, even from multi-faceted searches.

On a functionality level, it was important for Excel for Business to have wireless and remote access to the system via Windows SmartPhones, remote desktop and the web. When away from the office, staff had to have the same access to the database through an integrated content management system.

As a start up company, Excel in Business had no previous CRM system in place, so needed to find the right business partner to help it launch into the market place and provide the required business benefits it was looking for. In June 2006 the company conducted an evaluation of CRM providers through Maximizer Software certified business partner CentrePoint Software.

### Challenge

*To provide a complete, fully integrated CRM solution as part of the business inception that could be customised and grown as needed. The solution had to handle complex data enquires with ease and use existing information to update a central database on an ongoing basis.*

### Solution

*Maximizer Software offers an affordable, customizable and user friendly solution. It was able to provide a comprehensive piece of software, which could be integrated with Excel in Business' existing systems.*

### Results

*Excel in Business has successfully launched its business and A La Carte product range and Maximizer's CRM solution has aided and eased the process by providing an accessible, comprehensive customer database. Without this in place, Excel in Business would not have been able to commercially operate.*

*"Maximizer Software's CRM solution epitomises what CRM should be – a customisable, easy to use, full service offering."*

*- Paul Martin,  
Managing Director,  
Excel in Business*

### Key Benefits

- An accessible, comprehensive database encompassing customers and business partners
- Complete solution to manage all database and information flow that enable the company to hit the ground running from its inception with productive processes and performance
- The company can scale more quickly
- Management and staff are able to focus purely on growing the business rather than being concerned with divisional infrastructure

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*“Without Maximizer there would be no business.”*

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## A fully automated approach

During the evaluation process, Excel in Business conducted research and gathered opinion on three CRM system providers – Salesforce.com, Sage 200 CRM and Maximizer Software. Maximizer Software stood out due to its affordability, customisability, usability and ease of hosting.

Maximizer Software had the capability to provide an intelligent, usable database, which contained all the information required. From lead generated marketing data to sales information and customer service enquires, Maximizer Software was able to provide a fully comprehensive piece of software, which could be integrated with Excel in Business' existing systems.

Paul Martin, managing director at Excel in Business comments: “As an online business, we rely heavily on our infrastructure. For our marketing, data acquisition, order processing, software activation and technical support, it is essential for us to capture all the information from web enquires correctly – and be able to access it easily from our CRM application.”

Integration with existing systems was vital for Excel in Business and Maximizer Software was able to easily provide this. Maximizer is linked to an in house software routine that runs an encrypted software license key and distribution application that sends license files to it's new A La Carte customers. All subsequent A La Carte software registration details are then captured using Maximizer. This allows Excel in Business staff to see which users have valid licenses and any users who have had problems in activating the software. “As our software is sold per company and not per user, it is essential that we know who and how many our real user population is” said Martin.

Martin continues: “The installation of the software was carried out by Maximizer certified business partner; CentrePoint, but because of the customisability and availability of Maximizer on the web, we were able to carry out all the web integration as a virtual joint in-house/CentrePoint project. As the business develops we will be able to adapt Maximizer to evolve in line with our operation.”

Moving forward, through MaxMobile, the company could benefit from instant mobile access to customers, leads, schedules, sales deals and forecasts, and service cases directly on a smart phone or PDA handset.

## Hitting the ground running

Unlike traditional CRM projects, Excel in Business did not implement Maximizer just to improve its business, but rather the main goal was to help the company's inception allowing it to hit the ground running and scale far more quickly than would have been possible through a traditional start up approach.

Martin comments: “Interestingly, many start-up companies view a CRM solution as something to consider in the future. From our experience, CRM is an integral part of the growth of a company, as well as adding value when it comes to acquisition and funding.”

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Martin continues “All the required business processes were automated and in place before we started trading. This allowed both management and staff to focus purely on growing the business rather than being concerned with organisational infrastructure.”

Speaking about MaxMobile and its benefits, Ian Selvan, managing director at Maximizer Software certified business partner, CentrePoint Software, says: “Max-Mobile reflects the growing sophistication in business development by allowing organisations to access their leads and database remotely. This in turn helps them to compete globally and with larger enterprises.

Martin concludes “As Maximizer is such an integral part of Excel in Business, it would not be possible to run our organisation and achieve our business plan without the CRM system. Without Maximizer there would be no business. It epitomises what CRM should be – a customisable, easy to use, full service offering.”

## About Maximizer Software

Maximizer Software is a leading provider of affordable and easy-to-use customer relationship management (CRM) software applications. The Maximizer line of products help companies develop more responsive, personalised and profitable customer experiences. Built on a modern, Web-based architecture, Maximizer is easily integrated with existing corporate systems and features the latest in sales force automation, marketing automation, e-mail marketing and customer service technologies in a single mobile-accessible business management system. Maximizer Software has sold more than one million licences of its award-winning software solutions to companies ranging in size from entrepreneurs to multinational organisations. Customers include: Siemens, Playground - an Intrawest Company, HSBC, Cathay Pacific, TD Securities, Brian Tracy International, South Carolina Department of Commerce and Lockheed Martin.

## For More Information

Contact us to learn how we can help you accelerate your CRM success.

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