

Objectives of Maximizer CRM for Into Africa

Improve Process Efficiency, Improved Decision Making, Increase Customer Loyalty and Satisfaction, Increase Productivity, Increase Revenue.

Key Business Benefits achieved with Maximizer CRM

Centralisation of Customer Data, Improved Customer Experience, Improved Customer Segmentation, Improved Data Quality & Value, Improved Visibility of Communication & Activities, Improved Visibility of Internal Processes, Increased Productivity with Reduced Manual Admin, Increased Projected Revenue Visibility.

Actions / Considerations

No immediate actions required.

Conclusion

User adoption

Into Africa is a brand new Maximizer user; recently purchased in September for the meetings/events and incentive side of the Business. The CRM project is successfully driven by Alex internally, with the assistance and guidance of Nelia at Camsoft.

The main objectives for the Business are the following:

- To centrally manage all client, agency and supplier information; to help maintain successful business relationships and provide repeat sales.
- To measure business success via data trends: number of sales and closed revenue, repeat business, areas of success and areas of loss; to help the business make appropriate decisions.

Business growth plans

Continued business objectives are to engage with clients more effectively and to capture business results/data trends.

The Business has a total of 17 employees and sales offices in the UK and Scandinavia. There are growth plans to roll Maximizer out to the leisure side of the Business depending on the success of this first project.

The team has very recently started trialling the Customer Service module with the objective to manage sales associated tasks more efficiently e.g. delivering client presentations connected to the sale. They plan to look in to this process further.

Further discussion points

The Business prides itself on a bespoke tailored approach with its clients, and maintaining successful relationships with both clients, agencies and suppliers. The agencies provide the team with client briefings with specific information on group type, travel type, event type, objectives of travel etc; this then gets tailored in to a profile for the client. This selling of an event is managed via the Opportunity module

Reporting via dashboards is the next step the team wish to take; using the data they capture to build business intelligence and trends, helping them to prioritise sales opportunities and areas of growth.

How can you increase your Success with Maximizer?				
Internal Collaboration	Performance	Customer Intelligence	Customer Interaction	Cash Projection
It's important that staff can share internal documents, customer conversations and activities with other colleagues and departments to avoid duplication of effort and to save time.	Being able to easily view the status of sales, marketing or service activities across an individual or company basis, allows for management to alter company strategy appropriately or to spot trends and risks/successes more quickly. It also allows for management and individuals to easily display the contribution that individuals provide to the organisation.	It's possible to easily create an <i>Ideal Customer Profile</i> based on previous success that is recorded in Maximizer. This can be visualised in graphical form which can be used by marketing to look for and to generate similar business, and for sales to prioritise their efforts accordingly.	Drive satisfaction, loyalty and create customer champions by having access to previous conversations, documents and past projects - allowing you to enrich your relationship with them. It also helps others in the business to be a part of your customer's success easily.	Management need to have a clear and concise overview of expected and weighted revenue so that they can quickly determine future projected cash balances. Primary metrics which contribute to the business growth - such as Closed Business, Number of closed deals, average deal size can all point towards the Overall company Objective which may be to reach a revenue number. This can be visible in the dashboard.

What functions in Maximizer will help us to achieve this?				
Internal Collaboration	Performance	Customer Intelligence	Customer Interaction	Cash Projection
Notes	<u>Opportunities</u>	User Defined Fields	Notes	<u>Opportunities</u>
History	Customer Service Cases	Win/Loss Analysis	History	<u>Dashboards</u>
Favourite Lists	<u>Marketing Campaigns</u>	<u>Dashboards</u>	Phone Call logging	Quota/Target Management
Company Library	Tasks	Campaign Response Metrics	User Defined Fields	
Knowledgebase	Phone Call logging	<u>Marketing Campaigns</u>	<u>Opportunities</u>	
Action Plans	Activity Tracking	Column Reporting	Customer Service Cases	
Hot List Tasks			<u>Marketing Campaigns</u>	
			Quick Campaigns	
			Web to Lead Form	

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1. There is a clear objective to achieve with Maximizer CRM. e.g. " Increase visibility on likely incoming projects and cash flow"
 2. Alignment between CRM and your Company's primary objectives. (" I can see where we are against our yearly target")
 3. A dedicated or responsible internal CRM Champion who is able to monitor and progress internal adoption of the CRM.
 4. Users have received the necessary training to undertake their roles/processes using the CRM.
 5. A progressive and agile approach to how the CRM can grow with your business. (It is not just software but a solution)
 6. Support and Guidance from a Certified Partner who can assist you in your CRM Journey.
 7. Regular Account Management / Access to your Certified Partner / Company.
 8. Management and Leadership have a part to play with the development of the CRM.
 9. All users understand the value that the CRM brings to them, and to the company.
 10. Employees are able to collaborate by sharing information through the CRM

If you would like to expand your usage or improve your implementation of Maximizer, contact your Maximizer Certified Partner Camsoft.