

Customer Success Story

"Maximizer Enterprise now provides a holistic view of our investment advisors. With the integration into our transaction database, it streamlines processes and saves everyone time by reducing redundant data entry efforts. It also helps us utilize customer and sales information to conduct targeted marketing campaigns to more efficiently service the advisors who sell the funds we manage."

Murray Munro, Senior Vice-President,
National Sales, Marketing &
Government Relations, GrowthWorks



Industry: Financial Services

Location: Vancouver, BC

Web: www.growthworks.ca

Key Benefits

- ✓ Saved user and IT staff time with reduced reporting requests
- ✓ Holistic view of customer accounts with integration to transaction database
- ✓ Easy migration and growth with the company — from Maximizer workgroup to Maximizer Enterprise Pervasive to Maximizer Enterprise SQL
- ✓ Ease of integration and customization with other applications

GrowthWorks™

GrowthWorks™ Grows with Maximizer's Enterprise

When entrepreneurs need start-up capital, they turn to GrowthWorks™, which manages the largest venture capital investor in western Canada. GrowthWorks managed funds invest in entrepreneurial companies with the capital they raise. GrowthWorks own growth and success has been fueled by the successful relationships it has built with the investment advisors who sell the funds the company manages.

The Challenge

A long-time user of Maximizer, the marketing and client service representatives of GrowthWorks Operations Team were using the software to track basic information and communications with the investment advisors who sell their funds under management — primarily the Working Opportunity Fund and Working Ventures Funds. However, because sales transactions with investment advisors were tracked in a separate database, the marketing department couldn't easily analyze sales to understand the sales trends of the advisors. The IT staff had to constantly run reports for them.

The company and its technology infrastructure were growing, so GrowthWorks decided it was time to upgrade the company's CRM system.

The Maximizer Enterprise Solution

With the help of On-Line CRM Solutions, a Certified Maximizer Business Partner, GrowthWorks upgraded from Maximizer to Maximizer Enterprise 7 running on a SQL database. This enabled the company to integrate the customer database with the transaction database. The 50 GrowthWorks users were upgraded to Maximizer Enterprise 7 SQL eCRM Suite and worked with On-Line CRM Solutions to migrate the database from Maximizer Enterprise 2000 Pervasive to the newer SQL format.

"The migration path with Maximizer Software's products has been very smooth," commented Murray Munro, Senior Vice-President, National Sales, Marketing & Government Relations. "We have transitioned from Maximizer in a workgroup setting through different versions of Maximizer's software. Each time, the deployment and set-up have been very straightforward."

On-Line CRM Solutions used the Integrator's Toolkit to create hooks into GrowthWorks' transactions database to synchronize contact information into both contact fields and some user-defined fields in Maximizer Enterprise. On-Line CRM Solutions also created customized windows for GrowthWorks staff in Maximizer Enterprise so they can view the critical sales information they need, saving them time and ensuring clean data.

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 corporations. Simple, easy-to-use and affordable, Maximizer CRM enables companies to mobilize their workforces through all-access Web, Mobile and Desktop delivery methods. Easily configurable for organizations in any industry, Maximizer CRM optimizes sales processes, enhances marketing initiatives, and, improves customer service to ultimately boost productivity and revenue. Headquartered in Canada, with worldwide offices and business partners, Maximizer Software has sold over one million licenses to more than 120,000 customers since 1987.

Now, the Operations Team can more efficiently track and analyze sales without asking IT staff to run reports. They can quickly run their own reports to see sales figures for each investment advisor or to see aggregate reports of different branch's sales to identify individual and group sales trends and sales growth year over year. With this level of integration, the marketing department is also able to mine the database to track results of marketing campaigns.

"Maximizer Enterprise now provides a holistic view of our investment advisors," said Mr. Munro. "With the integration into our transaction database, it streamlines processes and saves everyone time by reducing redundant data entry efforts. It also helps us utilize customer and sales information to conduct targeted marketing campaigns to more efficiently service the advisors who sell the funds we manage."

Since the Operations Team has embraced the use of Maximizer Enterprise to make their work more efficient as well as save IT time and labor, GrowthWorks plans to implement more tools to help them save even more time in the future.

"With Maximizer Enterprise as our CRM system, we have moved towards a more seamless application of technology. Through one interface, users can see all the sales information they need in order to work efficiently and effectively. This makes the jobs for both users and IT staff a lot easier," said Mr. Munro.

About GrowthWorks

GrowthWorks (www.growthworks.ca) is a recognized leader in venture capital fund management with proven expertise in raising and investing capital. GrowthWorks™ managed funds, including the Working Opportunity Fund and Working Ventures Funds, have a combined \$700 million in assets across Canada. GrowthWorks has a team of skilled and knowledgeable investment professionals with a combined 200 years of experience. The Investment Team has a proven track record of identifying, structuring and making investments in emerging sectors, primarily in information technology, life sciences, advanced manufacturing and early stage investing.

**Working Ventures Funds are managed by GrowthWorks (WVIS) Ltd. and the Working Opportunity Fund is managed by GrowthWorks Capital Ltd™. GrowthWorks is a registered trademark of GrowthWorks Capital Ltd.*

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Simply Successful CRM

Call: 1-800-804-6299

Email: sales@maximizer.com

Web: www.maximizer.com

Americas

604-601-8000 PH
604-601-8001 FAX

info@maximizer.com

www.maximizer.com

Europe, Middle East

+44 (0) 1344 766900 PH
+44 (0) 1344 766901 FAX

info@max.co.uk

www.max.co.uk

Australia, New Zealand

+61 (0) 2 9957 2011 PH
+61 (0) 2 9957 2711 FAX

info@maximizer.com.au

www.maximizer.com.au

Asia

+(852) 2598 2888 PH
+(852) 2598 2000 FAX

info@maximizer.com.hk

www.maximizer.com.hk
www.maximizer.com.cn