

CASE STUDY

Emcore Asset Management AG

// FINANCIAL SERVICES



#GrowWithConfidence



“Maximizer’s service is awesome

We have a dedicated account manager who gives us personal attention.

That’s not been my experience with other CRM providers.”

Carolina Newton, Relationship Manager

OVERVIEW

EMCORE has been providing tailor-made and yield-orientated risk and asset management services to institutional investors since 1998.

Based in Switzerland with offices in Liechtenstein, the company has an impressive track record founded on its asymmetric risk-return investment strategies, commitment to long-term client relationships and blend of new ideas with traditional values.

Carolina Newton is one of EMCORE’s Relationship Managers. She’s responsible for bringing new clients on board and maximising their long-term value to the business.

Carolina explains: “From a product perspective, we have a truly stand-out proposition for institutional investors that differentiates us from competitors. But the quality of service we deliver, and the strength of our relationships with clients and prospects, is equally vital to our success.”



ADMINISTRATION AND
LEAD MANAGEMENT
TIME SAVED PER WEEK

TRADING UP TECHNOLOGY

Spreadsheet anyone?

It’s still common in asset management companies for each relationship manager to use a separate Excel spreadsheet to maintain their contact database and analyse their sales processes.

“The challenge is that once you reach a certain portfolio size, your spreadsheet becomes unmanageable. It’s impossible to segment contacts effectively, track your conversations, find information quickly or get a meaningful overview of your sales pipeline. You can easily miss valuable opportunities,” says Carolina.

EMCORE knew that they needed smarter, more dynamic technology to boost efficiency, standardise processes and enable the level of knowledge-sharing that would unleash the full potential of their ambitious team.

After a thorough analysis of the options available to them, they chose to partner with Maximizer Software, who helped to scope out their current and future requirements and implemented Maximizer CRM an on-premise Customer Relationship Management solution in tandem with training, customisation and full support.



VALUE AT EVERY STAGE

“Maximizer CRM has transformed the way we work. The biggest difference is the detailed insight into our sales pipeline which has improved forecasting, work scheduling and process analysis. The Maximizer team worked closely with us to create Dashboards of bespoke indicators including sales leads by stage – from cold through to warm and hot prospects, who are very near to investing in our funds. This visual tool is proving invaluable to help me manage my leads, saving me around 5-7 hours per week compared to my previous way of working.”

“Using the solution also allows me to spot trends, personalise my outreach and analyse my own performance - what is working well, and what isn't. I can easily share my learnings with colleagues and this has contributed to making

our sales process more consistent and structured - which in turn enables new team members to hit the ground running.”

The sales Dashboards have given company management full visibility into the performance of each relationship manager – and the team as a whole – so they can run detailed reports, monitor productivity and use data-driven insights to inform product strategy.

Carolina concludes, “Our vision is to deliver outstanding service to long-term investors. Maximizer CRM has already helped us to create stronger, more personalised and knowledge-based relationships. As a team we are much more efficient and confident in our decision-making and analysis.”



IMPROVED INSIGHT
TO SALES
PERFORMANCE

SUMMARY

- Optimised sales opportunities to drive profitability and assets under management
- Visibility into sales pipeline
- Business intelligence to improve relationships
- Targeting through segmenting and profiling contacts
- Efficiency through structure and coordination
- Management oversight of accounts and performance
- Aligned sales, marketing and service for a 360 degree client view
- Watertight documentation for regulatory compliance
- Insight into client needs guides future business strategy



“Thanks to Maximizer,
our sales process
and ongoing client
engagement have become
much more efficient.”

Carolina Newton, Relationship Manager



“Since 1987, more than **1 million users** and over **120,000 companies** have trusted us to help boost the bottom line”

Vivek Thomas, President

ABOUT MAXIMIZER

Grow with Confidence

Grow with Maximizer Personalised CRM

We make enabling your success our top priority. That's why we're committed to helping each of our customers achieve outstanding results.

With top-rated tools for contact management, lead management and customer service, Maximizer CRM gives businesses everything they need to grow – all in one place.

Today, Maximizer is a global company with offices in five countries plus an international network of Certified Solution Providers. We constantly innovate to ensure our customers can become more successful.

Time and time again, they tell us that our exceptional service sets us apart as a market leader in CRM. And that feedback keeps us focused on making planning, selling and management ever easier – to help our customers get rapid results.



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AMERICAS (HEAD OFFICE)

Maximizer Services Inc.
260 - 60 Smithe Street
Vancouver, BC
V6B 0P5 Canada
Sales +1 800 804 6299
Phone +1 604 601 8000
Email info@maximizer.com
Website www.maximizer.com

EUROPE / MIDDLE EAST / AFRICA

Maximizer Software Ltd.
1 The Courtyard
Eastern Road,
Bracknell, Berkshire
RG12 2XB United Kingdom
Phone +44 (0)1344 766 900
Email enquiries@maximizer.com
Website www.maximizer.com/uk

AUSTRALIA / NEW ZEALAND

Maximizer Software Solutions Pty. Ltd.
Level1, Suite 14, 32 Delhi Road
North Ryde, New South Wales
2113 Australia
Phone +61 (0)299 572 011
Email info.anz@maximizer.com
Website www.maximizer.com/au

WWW.MAXIMIZER.COM