



CASE STUDY

CCI Technology

| IT



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CCI Technology Solutions boosts efficiency with Maximizer CRM



CCI Technology Solutions boosts efficiency and finds clearer view of customer management through Maximizer CRM. With South Africa being wired for the global digital age over the last few years, CCI Technology Solutions has emerged as a leading IT infrastructure player in the country and, as its business has grown, so has the need for a software solution that enables more efficient management of its growing customer base. The company carries out the installation of cabling and other physical infrastructure for data delivery, including telecommunications, electrical installations, computer systems, CCTV and networks supporting wireless technology. It has a broad range of customers.

The challenge

CCI Technology Solutions' Managing Director, Stephen Pinkney, explains that the company's customer database has been building since the business was founded in 1986 and does not have a straightforward profile:

"Our clients range from the small entrepreneur up to some of the biggest corporate clients in South Africa. It's right across the board. As long as somebody needs IT infrastructure, we'll do it – whether it's a company in the insurance industry or one of the biggest retailers across South Africa. We're a third party integrator for a lot of the big IT companies in South Africa and we're not tied to any one vertical, so we basically do business across the whole spectrum."

After its first decade, CCI realized it needed help in managing its burgeoning prospect and customer database and so looked for an application that would do the job – at an affordable cost. CCI decided that it had found the right Customer Relationship Management (CRM) platform when, after sizing up a number of providers, it discovered Maximizer

KEY BENEFITS

- **Centralized database**
- **Outlook® and LinkedIn® integration**
- **Instantaneous searches**
- **Access to critical data from the office or on the road**
- **Superior search functionality which maximizes time boosted productivity**
- **Improved customer service**
- **Increased revenues – faster candidate searches**
- **User-friendly**
- **Time savings of 40 minutes per candidate through document auto generation**
- **Added security and business safeguarding through user restrictions.**



What we've found over the years is that their (Maximizer CRM) improvements have been quite dramatic going forward with each of their releases, so from a usability perspective I'm extremely happy with the product.



STEPHEN PINKNEY

Managing Director, CCI Technology Solutions

Software in 1998 through Camsoft Solutions, the company's South African partner. Camsoft guided CCI through the implementation of a solution that organized its diverse customer base and enabled CCI to track and keep ahead of sales to new prospects, current customers and older clients in need of updated IT infrastructure.

Inefficiency of doing things twice

Maximizer was indeed used primarily to track sales, but once the sale was made, another system was used to cost and manage the project. Over the years, however, CCI realized that it needed to integrate these two systems to cut out some of the duplication and inefficiencies built into its operations. Pinkney notes:

“Our accounting system is not just debtors and creditors: it's job-costing and job-costing is what we do. In other words, we need to know how much material and labour and all that kind of stuff is used on a job.”

Unfortunately, that kind of assessment and organization of resources was being done from scratch after each order was put through.

“What typically happened is that our sales reps would go out, they would see a client and from that they would basically create a quote,”

explains Pinkney. “That quote is tracked via Maximizer from a sales perspective, as an opportunity, until finally we get a win. As soon as it becomes a win – in other words, we've landed that job – it then integrates with our accounting system and that's where we start picking up project information like job card information, job number, all that kind of stuff. What we used to do was basically double capture everything – first as a sale in Maximizer and then we would go and re-capture all the information in our accounting system.”

Getting it all together

At the beginning of the year, the company decided to upgrade its Maximizer Software CRM platform to the latest version – which it has been doing on a regular basis since it first utilized Maximizer systems – and at roughly the same time integrate its accounting system with the CRM platform to cut out duplication and boost productivity. As CCI prepared to move over to Maximizer CRM 12 Enterprise Edition, it devised a way of feeding information back in that would be used in the accounting system to take advantage of the key sales management features of the CRM application.

“It was really to stop this double capturing that was happening all over the place,” Pinkney says, adding that it also gave

management a clearer picture of what was going on with the business. “What we find is that the Maximizer reporting is actually quite nice and it’s very easy, very structured, and I can drill down to specific reps and see what they’re doing with it. To do the same reports out of our accounting system was more difficult, so we decided we were going to bring the relevant information back into Maximizer and use it to run most of our sales reporting. Now we don’t have to enter the data in two places every time we do something.”



Maximizer has streamlined our operation

STEPHEN PINKNEY

Managing Director, CCI Technology Solutions



He outlines how the company linked the two systems: “We’ve actually written an integration interface between the two applications, automatically pulling key information, tracking it through the basic sales cycle to when we finally complete the job and it gets invoiced. After that the invoicing and cost information gets pulled back into Maximizer again, which means we can run reporting, job-costing, profitability reports straight out of the CRM system. Basically we track our sales from inception to completion, so at any stage we can see exactly where we are in our sales cycle from the Maximizer suite.”

Discovering a new, longer outlook

The new integrated platform has changed the way CCI does business, allowing the company to take a long view of each client through the customer lifecycle, which, in turn, has eliminated mistakes and inefficiencies.

“We have extremely disparate installation types and one of the challenges emerges when we are doing recurring business with clients, with fairly long gaps between each interaction. Once every six months we might be called back in to add a few extras, or they might be moving into a new building, or they might require some servicing. In these cases we have to keep track of the products that we were installing and what we’ve done in the past, so the guys don’t arrive with all the wrong stuff. Maximizer has streamlined our operation and stopped us going back and forth with incorrect types of cabling and other materials.”

The result has been that the company starts tracking everything from the day a job gets opened and, as Pinkney says, “the whole Maximizer integration into that job-costing package has just made it so much easier and so much less time consuming to track all our paperwork. It’s an integral part of business”. He adds that there is an incredible amount of data sitting in Maximizer historically from years and years of gathering information about clients. “It’s really a one-stop shop for us to have a look at where we are as far as our sales cycles are concerned.”

Looking to a more mobile future

CCI Technology Solutions is far from finished when it comes to getting more out of Maximizer. The company is already

considering how it can harness Maximizer's mobile capability. The company has held off so far, but Pinkney now thinks the time may soon be right to arm its people in the field with the ability to tap into the CRM platform anywhere, anytime through the web.

"South Africa is always a bit of a challenge because our mobility connectivity is a bit iffy at the best of times," he explains. "It's something we're going to look at – guys will probably start utilizing iPads, getting sign-offs done online, all that kind of thing – but it's an area we haven't really delved into yet. From what I can gather about the functionality for mobility with Maximizer, it's not going to be too much of a headache getting us up and running."

Part of CCI Technology's confidence in the future with Maximizer lies with the fact that throughout the past each transition to a newer, better version of the system has been virtually seamless. "It's just been fairly smooth," observes Pinkney. "What we've found over the years is that their improvements have been quite dramatic going forward with each of their releases, so from a usability perspective I'm extremely happy with the product." Can he imagine life without Maximizer? "Absolutely not – that'd be an absolute pain."

About Maximizer

Maximizer CRM is fueling the growth of businesses around the world.

Our CRM solutions come fully loaded with the core Sales, Marketing and Service functionality companies need to optimize sales productivity, accelerate marketing and improve customer service. With flexible on-premise, our cloud and your cloud deployment options, tailored-to-fit flexibility, state-of-the art security infrastructure, industry-specific editions and anywhere/anytime mobile access, Maximizer is the affordable CRM solution of choice.

From offices in North America, Europe, Middle East, Africa and AsiaPac, and a worldwide network of certified business partners, Maximizer has shipped over one million licenses to more than 120,000 customers worldwide.

Certified Solution Provider



Camsoft provides full turnkey CRM solutions, including software sales, training, support, development and service level agreements, where required. Camsoft's offices are located in Johannesburg, Cape Town and Durban.

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