



CASE STUDY

RDS Delivery Service

| MESSENGER DELIVERY SERVICE



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Marketing Automation Leverages Time, Saves Resources, Gets Customers, Keeps Customers

RDS Delivery Service President Larry Zogby is a visionary who believes in leverage, efficiency, and learning from others. As a member the New York chapter of the Entrepreneurs' Organization (www.eonetwork.org), Zogby strives to surround himself with influential and successful business people and learn from their experience. When he discovered that worker retention rates among employees with mild learning and anxiety disorders were higher than the general population, he solved a concern over employee turnover by hiring qualified applicants with mild disabilities. This step, combined with other employment initiatives, contributed to RDS Delivery Service winning a Recognition Award from the Vocational and Educational Services for those with disabilities in 2000.

Situation

In 1996, with a customer base expanding from about 70% in the medical community into PR companies and other target markets, Zogby knew from mentors in his professional network that a CRM system would be required to monitor business development, track customer accounts, improve forecasting and reporting, and move his company to the next level.

Solution

Wanting a CRM system to facilitate the type of growth and service they envisioned, the Executive team at RDS evaluated both Maximizer and ACT! President Larry Zogby likes tools that are simple to use and are good value. Maximizer offered both, and teams in collections, sales, accounting, and administration began using it. Zogby himself began using Maximizer to track his tasks, notes, documents, and sales pipeline.

KEY BENEFITS

- **Created single point of access for key company documents and customer information**
- **Improved marketing assistant and sales team efficiency by 70%**
- **Enabled company to increase annual revenue from \$2.25M to \$4.5M USD in 3.5 years**
- **Provided sales and administration infrastructure for successful acquisitions and exponential future growth**

Easy to Use, All Information in One Place

“I found Maximizer incredibly easy to use. It’s indispensable. On a typical day, I check email, track what’s happening in my various prospect groups through the Dashboard, check my hot list of tasks, and check the calendar. Everything is in one place,” says Zogby.

In particular, Zogby appreciates the notes and documents feature. “I love the ability to make certain notes and entries public or private. Knowledge is power, and I want to ensure people with the right roles and responsibilities within the company have access to the most powerful knowledge in our system.”

High Quality Training Makes you More Efficient

Zogby’s business philosophy is based on leverage. “I believe in leverage,” says Zogby. “From taking Maximizer training to surrounding myself with powerful entrepreneurs to learn from their experience, I don’t ever want to be learning ‘on my own’. Why learn solo when you can benefit from someone else’s experiences and see how they made the most of the tool or strategy that makes them successful?”

Zogby encourages all new Maximizer Enterprise customers to invest the time and money to be properly trained by either Maximizer themselves or a Maximizer partner.

“I’ll confess,” he says, “Eleven years ago when we put in Maximizer, I made the mistake of not investing in training early enough, thinking my team and I could learn it ourselves.

There’s a lot in the software — and, yes, it’s

easy to use right away. And, trust me, you’ll get even more out of it, sooner, with training and support from Maximizer professionals. You’ll get fast tracked into understanding some of the most powerful parts of the tool.”

Marketing Module Automation Saves Resources

One of the most powerful parts of Maximizer Enterprise, according to Zogby, is the Marketing Module.

“Campaign Management in Maximizer Enterprise 9 is amazing. If I had had any idea of the leveraging power available to me in version 9, I would have upgraded sooner,” recalls Zogby.

According to Wintec Group Inc. (www.wintecgroup.com), the multiple award-winning Maximizer partner who helped RDS Delivery Service upgrade to Maximizer Enterprise 9 in 2005, RDS Delivery Service distinguishes itself among Maximizer users by the way they’ve implemented targeted, hands-on, automated marketing campaigns in the Marketing Module.

“This is how it should be done,” remarks Jon Arancio, Founder, Wintec Group Inc.

Story has it that Larry, a few key executives, a copywriter and graphic designer spent a few intense, focused weekends (with a few bottles of good scotch) to put together 6 different 24-month drip campaigns to help RDS reach and remain top of mind with their 6 distinct target markets. The campaigns were well thought out and effectively mixed e-mail, print, hand-delivery and phone “touches” into one comprehensive campaign. With target markets like inbound prospects, PR



People often comment on the amazing growth and success of RDS Delivery Service. It's not me — it's Maximizer. They're the ones who've given us the tools to do this.



LARRY ZOGBY

President, RDS Delivery Service

company prospects, vendors, customers, lost customers, and Larry Zogby's "circle of influence" referral sources, the objectives of the campaigns ranged from establishing credibility, to demonstrating a high level customer service experience, to educating on the benefits of using RDS.

Once an outbound prospect is added to RDS's Maximizer Enterprise database, for example, an individual campaign time frame is launched for that entry. The prospect would receive a call on day 1, an email citing one benefit of using RDS Delivery Service on day 2, another on day 5, then receive a hand-delivered gift on day 7. Day 9 is a follow up call from Sales, asking if they received the gift.

Says Arancio, "What excites me most about Maximizer Enterprise is the way a company can save on resources by breaking down their marketing effort into automated steps. Larry knew what would work for his customers and prospects, and invested the time to create Action Plans in Maximizer Campaign Manager that really work."

"Maximizer Enterprise was designed to help companies achieve a high ratio of leveraged time for employees and executives in Administration, Finance, Support, and Marketing," says Peter Callaghan, Chief Sales Officer, Maximizer Software. "With more than

8,000 customers, Maximizer is the world's most popular and proven full-suite customer relationship management products for small and medium sized businesses."

"The time and money RDS invested in Maximizer has paid off so many times over," continues Arancio. "Now that the steps in the Action Plan are set up, RDS get high conversion leads and loyal customers with the consistent follow-up Maximizer ensures. Customers and prospects are especially pleased with the hand-delivered gifts from RDS, gifts like chocolates, candy, or an inspirational quote books. And it's so appropriate that they're delivered by New York's best known uniformed delivery service."

"Maximizer Enterprise is essential to our marketing efforts," says Zogby. "Manual tasks — like delivering a gift - are mixed in with automated tasks like sending an email. As the campaign progresses, tasks that need to be done manually show up in the appropriate person's Hot List. For example, 'Print postcard and mail to Prospect X' or 'Deliver cookie gram by RDS to Customer Y'. Emails are sent automatically by Maximizer."

Though the costs for conceiving the Action Plan steps — as well costs for the copywriter and the graphic designer — need to be paid

up front, Zogby estimates using Maximizer Enterprise to run automated marketing campaigns instead of marketing assistants saves him 70% in human resource costs. “We save huge money doing it this way.

Over a 12 month period, Maximizer Enterprise and about 10 minutes in Sales phone calls and data entry can accomplish as much as a marketing assistant would in 2 hours — writing emails, making calls, printing and mailing postcards and the like. Even taking into account the difference between the salaries for individuals with those skill sets, it’s like saving \$17,500 per year in salary per team member. And, there’s no ‘forgetting’ to follow up.” “With Maximizer, it’s a win-win,” says Zogby. “Our well-run marketing campaigns are thorough, cost-effective, and allow us to show the widest group of prospects and referral sources that we’re serious about them and their deliveries,” says Zogby.

Focused on leverage and future growth, Zogby and team plan to double their revenue again by 2010, and are actively seeking to acquire delivery companies in their target market for their staff and customer base. “With all these new clients and routes, Maximizer will keep us on track and able to keep delivering the high quality service we’re known for.”

Return on Investment

- Created single point of access for key company documents and customer information
- Improved marketing assistant and sales team efficiency by 70%
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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.

Our Customer



RDS Delivery Service

RDS Delivery Service, New York's best known uniformed message delivery service, has been a growing, successful business for over 30 years. Serving the tri-state area of New Jersey, Connecticut, and New York, and co-owned by brothers Larry and David Zogby, RDS Delivery Service targets clients in the medical community, PR companies, beauty product companies and others — especially those with time-sensitive delivery needs. The company is known for their great rates, 24/7 delivery times, 1-2 hour deliveries, easy-to-use online order system, instant proof of delivery, and reliable package tracking service. With Maximizer as a key business and marketing tool, RDS Delivery Service and its 150 member staff have doubled revenues in the last 3.5 years and are on track to hit \$4.5 million by year-end 2007. The company's strong growth and staying power in the messenger industry has led them to become one of the most profiled service teams in the business.



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