



CASE STUDY

Strategico Marketing Group

| MARKETING



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 **MAXIMIZER CRM**

Maximizer From Salesperson to Marketing-Driven in One, Simple Technology

As the leader of the specialist team, founder Brian Pleet is responsible for business development — identifying new clients, proposing the group's expertise and managing the client's satisfaction. A long-time Maximizer customer, Pleet uses CRM software to manage the growth of Strategico Marketing Group including tracking all interactions with clients, managing delivery of a relevant, monthly newsletter and building proposals to new and existing clients. After 20 years using the system, Pleet has achieved a 100% customer retention rate, grown the business to include twelve industry specialists and is on target to double revenues over the company's last fiscal year.

Tailored Advice for Business Success

Business-to-Business organizations often need access to sales and marketing expertise to optimize the ROI of their sales and marketing investments. Enter Strategico Marketing Group. With Brian Pleet leading business development, the group is comprised of independent consultants from varied business disciplines and areas of expertise — none are employees of Strategico Marketing Group. The group's expertise allows business-to-business companies to focus on their core competencies by providing, as required, a tailored package of marketing and sales related consulting services that compliment the client's own efforts. According to Pleet, "It seems obvious, but our role is to ask the hard questions of company management and then sit back and listen. Often, we find that executives are so close to their day-to-day tactics that they can't see the larger picture and long-term strategy for improving their marketing and sales. Sometimes, our experts offer something as simple as putting together a focused sales meeting agenda to help kickoff a product launch. In other cases, client's have come to rely on our experts to help prepare

KEY BENEFITS

- **Revenue growth of 100% year over year**
- **100% customer retention rate**
- **Access from anywhere using a Palm handheld device**
- **0-5000+ business relationship growth in 6 years**
- **Targeted, low-cost email marketing**
- **Extremely easy to learn for new staff**



In all my 30 years experience, I have never encountered an easier to use product for promoting business success than Maximizer. Since I founded my company, I haven't lost a single customer. In many ways, Maximizer has ensured my success.



BRIAN PLEET

Founder, Strategico Marketing Group

a documented strategic plan, to develop a concise value proposition, or to improve their sales reps' skill levels... By harnessing the unique expertise of each of our group's members, we've found that we can save companies literally millions in misdirected effort and resources."

No Client Slips Through The Cracks

Using Maximizer, Pleet keeps track of all interactions with current clients, past clients and organizations that may be in search of services from Strategico; capturing email conversations, notes from phone calls and in-person meetings to ensure that they can be easily recalled for the next meeting. Currently managing relationships with more than 5,000 business contacts, Pleet is a power-user of the Maximizer Hotlist function — a reminder enabled checklist of "to do's" that ensures that no matter how busy his day is, he will never overlook a commitment or forget to respond to a client inquiry. "For an owner/operator in a small business, the Maximizer Hotlist is unbelievably powerful, says Pleet. "Maximizer doesn't care how busy you are or how many tasks you plan on accomplishing in a given day but it will faithfully remind you to make that call back that leads to signing a new client every time. I sleep much better at night knowing that even if I've snoozed a few Hotlist

tasks, Maximizer will remind me to get on top of it in the morning."

Staying 'Top of Mind' with Marketing Automation

"If there is one piece of advice I could offer business consultants (and I have many pieces of advice) it is that you are most successful when you are a marketer, rather than a salesperson. If you rely on your current network for business development and spend your time one-on-one selling, you're not growing your business. The secret lies in managing your current business relationships with minimal effort while aggressively expanding the group you are actively selling to — integrated sales and marketing. As a small business owner with limited resources, this is where technology is your best friend."

According to a 2007 study by marketing research leader MarketingSherpa, more than 70% of buyers 'found' (often online) the products they were looking for rather than being 'found' by the companies wanting to sell them products. Essentially, research indicates that staying top of mind, or the first product that comes to mind is a key indicator of success.

In order to remain top of mind with all of Strategico's contacts, founder Brian Pleet

uses Maximizer to maintain his monthly newsletter subscription lists. As contacts change companies, get promoted within their organizations or form relationships with other Strategico contacts, Pleet makes simple updates in his Maximizer database. Then, each month, he produces and delivers an email-based newsletter that provides tips and thought provoking topics to each of his contacts. “By keeping an ongoing relationship with everyone we’ve met or worked with, we stay top of mind. When the time comes and the company is actively searching for services like ours, we are naturally the first company they contact. By using the CRM technology, we remember how we met that contact, details of our last meeting — even a contact’s favorite sports team. With that kind of set up, our chances of securing their business are very, very good.”

By using CRM software to automate some aspects of staying in touch with its customers, Strategico is able to manage relationships with large numbers of current and prospective clients without adding a large staff.

On the Importance of Easy-to-Learn Technology

While Strategico has been extremely successful at balancing the demands of a large client base with the need to add additional staff, there have been times when Pleet has needed to bring in new people and bring them up-to-speed on using Maximizer. With a list-based user-interface that is visually similar to Microsoft Outlook, Strategico finds that new staff members are able to learn Maximizer very quickly.

According to Pleet, “Maximizer is very easy to use and that is one of the reasons I have stayed with the product through several generations. A great example is the experience we’ve had with the company’s newest summer student. She joined us for the summer beginning in June and within two weeks, not only had she learned Maximizer, we actually had her on the phones calling clients. Because of the workflow built into Maximizer, we could count on her to have great conversations with clients and accurately capture that information in Maximizer for the next time we contacted them. And, because it automatically captures and links email to contacts, even email conversations are filed away securely.”

Maximizer’s popular “User Defined Fields” or searchable system folders similar to those found in Outlook also help Strategico run the business without the need to hire expensive outside IT contractors. When Pleet and his team determine that they need to begin tracking a new type of customer information, for example, companies who have expressed interest in attending a Strategico-sponsored event, Pleet simply right clicks, and creates a new system folder names it “Marketing Events” and begins keeping track of contacts who may want to attend. “Maximizer is really the best of both worlds. It provides you with a documented series of steps to close a sale or market to a customer but still gives you the flexibility to change the process at anytime.”

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



Strategico Marketing Group

Founded in 1991, Strategico Marketing Group specialized in helping emerging technology companies launch their new products into highly-targeted niche markets. As it matured Strategico built a team of industry specialists — each providing unique expertise in areas that include sales training, market segmentation, channel development and a host of other disciplines — to a broader set of business-to-business clients.



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