

CASE STUDY

Inspire Professional Services

// MENTAL HEALTH CHARITY



#GrowWithConfidence



OVERVIEW

"Having tried several solutions over the years, without much success, Maximizer's technical capabilities, combined with excellent local support, has finally set us on the right track with CRM."

Gavin Megaw, Assistant Director

Inspire Workplaces is a social enterprise within Northern Ireland's Inspire mental health charity, and is the leading workplace mental health and wellbeing solutions provider in Ireland and the UK.

It delivers a wide range of employee assistance programs, both online and in person, specialist mental health interventions and onsite training services to over 300 organisations across the public, private and third sectors in Northern Ireland.

With such a wide and expanding range of service lines and vast volume of customer data to manage, Inspire knew that adopting right Customer Relationship Management (CRM) solution could make a huge difference to their efficiency, profit and growth potential.

But Inspire's first experiences of CRM were not as positive as they had hoped – a common story for many organisations.

ON THE RIGHT TRACK

Gavin took the lead in searching for a new CRM solution that would better meet the needs and growing ambitions of their organisation.

"Having had our fingers burnt in the past meant that we had a very clear idea of what would work for us going forward," says Gavin. "We needed a local contact who we could pick up the phone to, who could come in and assist us with implementation, and train us in person."

At a local business event, Gavin met Niall McCaffrey, Managing Director of ProActivity, Maximizer Software's Certified Solution Provider for Northern Ireland.

Gavin Megaw, Contracts and Business Development Manager, explains: "We've tried out a couple of different CRMs over the years, including the market leader, and it's fair to say that they didn't really get off the ground.

"They were never fully adopted by users, mainly because they didn't really fit our needs properly. We didn't have the necessary training and support, and found that the technology lacked the flexibility and functionality to manage our diverse product set."

Niall put forward Maximizer Software as an ideal choice and Gavin was immediately impressed with the flexibility and breadth of functionality within Maximizer's CRM, and reassured by ProActivity's local presence and proactive attitude.

"We felt that Maximizer was user-friendly, easily customisable and that we could apply it across numerous different teams within the organisation. These strong technical capabilities, combined with the excellent local support of ProActivity, finally set us on the right track with CRM."

Why Inspire chose Maximizer

- Local business partner
- Breadth of technical functionality
- Easily customisable
- Charity discount provided
- Flexibility to support business expansion

At a glance: Key benefits

- Single customer view, improved quality of account management
- Improved volume of proposals & conversion
- Visibility of sales cycle, improved closure rates
- Reduced admin, quicker reporting
- Insight into performance and market opportunities
- Business and customer information meets and exceeds the ISO standards

FULL STEAM AHEAD

"Having ProActivity on our doorstep has been instrumental. Niall comes in and shows us how to use certain features, how to manage a specific campaign or make the most of the latest software update."

Inspire has successfully embraced Maximizer, currently with 12 users across its sales, marketing, field support, customer account and management teams.

The benefits have been numerous. Gavin says: "Under the close guidance of ProActivity, we were able to centralise data across our different teams, creating a single view of our customers - the cornerstone of unified and intelligent customer management, delivering that all-important added value."

This has definitely made us better at drilling down into customer accounts, engaging more closely with our database and from an internal perspective, the CRM has improved efficiency across sales, marketing and service.

Focusing specifically on new business development, Gavin continues: "Maximizer has streamlined our sales process significantly. Each sales manager has a detailed overview of their prospects and growth opportunities, and a more structured follow-up system. Plus, we can track proposals through the pipeline and monitor progress, checking that we are on target with our monthly account management plan. This was previously a manual and time-consuming task."

STRATEGIC INSIGHT

CRM has helped Inspire turn business data into real, actionable intelligence. "Using the easily customisable dashboards, indicators and in-built reports, we can analyse our activities in far greater depth and spot what is working well and where we need to make changes," comments Gavin.

"Importantly, we have a clearer picture of precisely who is buying what. This allows us to be more strategic, identifying sales patterns and market appetite new products."

Better visibility and control over their business data has also simplified the task of monthly reporting to the parent charity. "Maximizer gives us fast access to the information we need," says Gavin.

SUPPORTING FUTURE GROWTH

"We are very satisfied with our choice of CRM provider and the benefits we've achieved so far. The CRM has brought everything together in a smart, meaningful way.

"Continuing to work with ProActivity, I look forward to reaping further value from Maximizer in the future, especially as we expand geographically and roll out new services such as our innovative digital hub. Predictive sales forecasting is another area to explore."

"Maximizer is playing a vital role in helping us pursue our ambitious growth plans with confidence," Gavin concludes.

"Maximizer has tremendous functionality and acts as a powerful platform to boost productivity and business insight. It's becoming the heart of our operations."

Gavin Megaw, Assistant Director





"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.

CERTIFIED SOLUTIONS PROVIDER

ProAptivity

ProAptivity (est. 2011) specialises in the deployment of Maximizer CRM throughout Northern Ireland, supported by our team of experienced CRM Consultants.

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