

CASE STUDY

Inspire Workplaces

Centralising customer information, strengthening sales processes and building business confidence with Maximizer CRM.

AT A GLANCE

WORKPLACE WELLBEING

Employee assistance, mental health support and training services.

CRM ADOPTION

12 users across sales, marketing, field support, accounts and management at the time of the case study.

01 / THE CUSTOMER & THE CHALLENGE

The right CRM matters.

Inspire Workplaces, a social enterprise within Northern Ireland's Inspire mental health charity, provides employee assistance programmes, specialist mental health interventions and workplace training.

At the time of the original case study, its services reached more than 300 organisations across the public, private and third sectors. As the range of services expanded, customer information and processes became increasingly complex.



WHY EARLIER SYSTEMS FELL SHORT

Inspire had already tried several CRM systems, including a market-leading platform. Adoption remained limited because the tools did not adequately match its diverse service lines, and the team lacked the training and practical support required to make them effective.

WHAT INSPIRE NEEDED

A flexible, user-friendly CRM that could support different teams, bring customer information together and provide a local partner available for implementation, face-to-face training and ongoing guidance.

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They were never fully adopted by users, mainly because they didn't really fit our needs properly.

Gavin Megaw / Contracts and Business Development Manager

02 / THE SOLUTION

Technology backed by hands-on expertise.

ProAptivity introduced Maximizer CRM as a flexible, customisable platform suited to Inspire's varied service lines. Its local presence and proactive support were central to the decision.

WHY MAXIMIZER & PROAPTIVITY

Inspire wanted more than software. Gavin Megaw sought a partner who could explain functionality, assist with implementation and provide training in person. ProAptivity helped the team use the system for specific campaigns, adopt new features and respond to changing requirements.

FLEXIBLE PLATFORM

Customisable CRM features supported sales, marketing, field support, customer accounts and management.

PRACTICAL SUPPORT

Local guidance, in-person training and ongoing help encouraged teams to make meaningful use of the CRM.

FROM DISCONNECTED DATA TO ONE CUSTOMER VIEW

With customer information centralised, Inspire gained a more consistent picture of its accounts and activity. Sales managers could review prospects, follow-ups and proposals through the pipeline, while teams had a stronger foundation for coordinated customer engagement.

03 / THE RESULTS

Connected teams. Clearer business insight.

Inspire reported improvements in sales management, cross-team efficiency and the ability to turn CRM information into practical business insight.



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 / Inspire Workplaces

01

Centralised customer data

A single view of customers across teams.

02

Structured sales follow-up

Better tracking of prospects, proposals and opportunities.

03

Clearer management reporting

Custom dashboards, indicators and reports.

04

More strategic decisions

Improved visibility of buying patterns and service demand.

Make your CRM work harder.

Talk to ProAptivity about improving customer management, reporting and business processes.

[Get in touch](#)