ProAptivity
CRM Specialists

CASE STUDY

Miskimmin Taylor

Tailoring customer management to improve reporting, planning and client service.

AT A GLANCE

FINANCIAL ADVICE

Miskimmin Taylor provided independent financial services to individuals and businesses in Northern Ireland. Its work depended on trusted, long-term relationships and accu

AT THE TIME

Over 5,000 clients at the time of the original case study.

01 / THE CUSTOMER & THE CHALLENGE

The right CRM matters.

Miskimmin Taylor provided independent financial services to individuals and businesses in Northern Ireland. Its work depended on trusted, long-term relationships and accurate client information.

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THE CHALLENGE

As the firm grew, its existing CRM was no longer meeting its needs. Appointment setting, statistical reporting and diary management were especially important to the office team, but the previous system was falling short. Office Manager Debbie Reid oversaw communications, marketing, enquiries, events and daily office administration. The business needed a CRM that was easier to use, could be tailored to its processes and would improve access to information.

WHAT THE ORGANISATION NEEDED

A tailored, intuitive CRM for appointment scheduling, diary management, statistical reporting, document production and consistent client information.

> **Particularly beneficial to us is the statistical reporting which meets our specific needs, making Maximizer invaluable for our business.**
>
> Debbie Reid / Office Manager, Miskimmin Taylor

02 / THE SOLUTION

Technology backed by practical expertise.

Miskimmin Taylor selected Maximizer because it could be configured around the firm's requirements. ProAptivity supported implementation and provided accessible, knowledgeable local expertise.

THE IMPLEMENTATION

The original case study records the adoption of Maximizer Entrepreneur Version 12 in March 2013. The transition was described as straightforward, with minimal training and little or no downtime. The team integrated the CRM with Microsoft Word and Outlook. It used diary functions, mail merge, exports and tailored reporting to support routine operations and customer communication.

TAILORED WORKFLOWS

Configured around the firm's particular diary, reporting and communication requirements.

LOCAL EXPERTISE

ProAptivity's Niall McCaffrey was praised for being accessible, knowledgeable and supportive.

THE BUSINESS IMPACT

The customer reported improved business processes and easier access to the information needed for client management and office administration. The benefits described here reflect the period covered by the original customer case study.

03 / THE RESULTS

Better processes. Clearer information.

The customer reported improved business processes and easier access to the information needed for client management and office administration.

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>
> **Debbie Reid / Office Manager, Miskimmin Taylor**

01 Reporting tailored to the firm

Statistical reports aligned with its requirements.

02 Less manual administration

Mail merge and export functions saved time and money.

03 Improved diary management

More effective planning and appointment setting.

04 More accessible information

Less reliance on spreadsheets and a clearer dashboard.

Make your CRM work harder.

Talk to ProAptivity about tailoring CRM to the way your business works.

Get in touch