



Maximizer Enterprise™

Opalis Software, Inc. Opalis Software Uses CRM and Reduces Time Per Transaction

"Maximizer Enterprise brings a crucial dimension to the business process by facilitating improved customer interaction and intimacy to help us differentiate our business."

*- Rob Tavares, Vice President of Sales,
Opalis Software, Inc.*

Opalis Software, Inc.

Industry: High-Tech

Location: Toronto, ON

Web: www.opalis.com

Key Benefits

- ✓ Significant improvement in sales rep productivity
- ✓ Provides access to critical data at the click of a button
- ✓ Reduces the amount of time spent on each transaction
- ✓ Integrates easily with Intuit's QuickBooks
- ✓ Minimal upfront costs



Opalis Software is a privately held, international software company, headquartered in Toronto, ON. Founded in 1998, Opalis delivers datacenter automation software worldwide to more than 500 customers in the industry, 50 of which are Fortune 50 companies,

helping them reduce operational cost and increase service levels by automating and simplifying their enterprise datacenter.

To gain clarity into their own business, learn more about their customers, and improve the way departments interact with each other and with customers, Tavares invested in a customer relationship management (CRM) system and integrated it with existing technologies, like Intuit's QuickBooks.

"Business process management is about people, processes and integration," said Rob Tavares, Vice President of Sales, Opalis Software. "Maximizer Enterprise brings a crucial dimension to the business process by facilitating improved customer interaction and intimacy and helping us differentiate our business."

Problem / Challenge

Opalis Software was successful helping other companies manage their business processes, and by 2002 had signed on more than one thousand customers. As the Company increased in size, the executive management team realized they needed a way of managing maintenance expirations, serial numbers, and the increasing number of customer calls. Tavares recalls how their sales team used to spend hours completing and processing a single transaction.

"Our sales team used to make quick updates to their customer records using Excel and then walk that information over to the accounting department so they could start processing the order. We have thousands of customers now and there was no way Excel was going to cut it, in terms of tracking and sharing customer information between teams and with other departments. For a company that is built on helping organizations improve business processes, this was simply unacceptable, which is why we looked for a CRM system that could be easily integrated with QuickBooks, the accounting system we put in place," said Tavares.

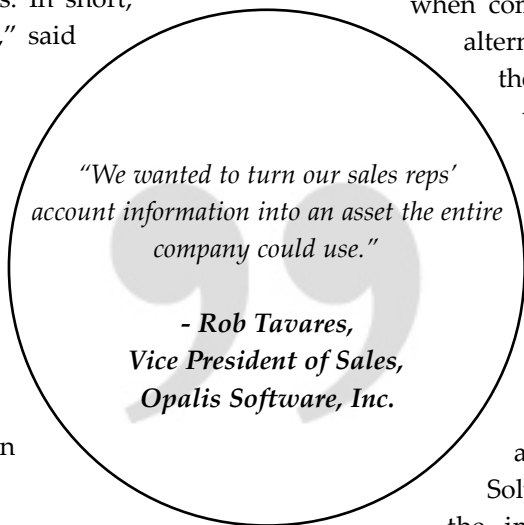
As Opalis Software grew in size, more customer service and support representatives were brought on to help the company stay ahead of new customer requests. These employees also needed access to complete customer records.

“Our sales team needed a fast way of recording customer details in our database, which they could send to our accounting department to start processing orders. At the same time, our customer service and support department had to have access to the database to efficiently and effectively address customer concerns. In short, what we needed was a CRM system,” said Tavares.

The Maximizer Enterprise Solution

Opalis Software chose Maximizer Enterprise over several possible solutions because it met their technology needs from a sales force automation perspective, and because the product offered the flexibility and integration capabilities the organization required.

“We wanted to turn our sales reps’ account information into an asset the entire company could use,” Tavares recalled. “When we evaluated different CRM systems, we looked for one that was scalable, proven and affordable, and could integrate easily with QuickBooks and our custom license manager and registration system, and would give us a variety of reporting options.”



Implementation

According to Tavares, the initial implementation was “pretty typical” with employees using Maximizer Enterprise primarily for Sales Force Automation, working remotely and synchronizing their individual databases with the company’s main database. However, based on high user adoption rates, Maximizer Enterprise was integrated with QuickBooks and their homegrown registration and license system.

“The upfront costs were pretty minimal, especially when compared with some of the on-demand alternatives and more complex systems out there,” said Tavares. “The Web portal within Maximizer Enterprise is great. Since it was built on the Microsoft .Net platform it can work entirely over the Web. Many of our salespeople use the portal to access information when they are on the road or at client meetings.”

The Customer Continuum Group, a Maximizer Software Certified Solution Provider in Toronto, completed the implementation for Opalis Software. According to Bruce Russell, President of CCG, “Opalis Software was up and running in about a week, and it then took us about a month to customize the software and integrate it with their custom license and registration system.”

The next step was introducing the sales team to the Maximizer Enterprise Web client.

“We found the features and functions with the Web client to be very powerful,” Tavares said. “Maximizer Enterprise provides us with a flexible platform to build upon as our company continues to grow. Once we achieved our initial goal, the next steps were incremental and, from our point of view, had almost no costs associated with them with major benefits to the users.”

Results

For the sales reps at Opalis Software, Maximizer Enterprise CRM is providing them with access to critical data at the click of a button. The system also met Opalis Software's goals of reducing the time per transaction and better reporting on customers.

"Overall, Maximizer Enterprise has provided significant improvement in sales rep productivity with a 20 percent across-the-board time savings, as well as 23 hours a week time savings on reporting and forecasting from a business unit," said Tavares

As for the future, Tavares plans on rolling out Maximizer Enterprise to more than one hundred users.

"Eventually we plan on opening up the portal to our resellers and partners too," said Tavares.



About Maximizer Enterprise

Maximizer Enterprise 8 is a proven, affordable CRM solution that helps small and medium-sized businesses succeed with an integrated suite of software tools to attract prospects, win new customers, and increase repeat business. With the lowest Total Cost of Ownership in its class, Maximizer Enterprise 8 is quickly deployed, simple to use, easy to administer and has the functionality businesses need to build successful, profitable customer relationships throughout sales, marketing and customer service & support.

About Maximizer Software

Maximizer Software Inc. provides proven and affordable customer relationship management (CRM) and contact management solutions that help small and medium-sized businesses increase sales and win new customers, streamline marketing to attract new prospects, and enhance customer service & support to increase repeat business. Maximizer Software has helped over 6,000 Maximizer Enterprise™ customers and more than one million Maximizer™ users grow their businesses by building profitable customer relationships with award-winning solutions.

Awards



For more information:

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