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*Deb Sepich,
V.P. & Chief Operating Officer,
Dolphin Software Inc.”*

Industry: Technology

Location: Lake Oswego, OR

Web: www.dolphinmsds.com



Key Benefits

- ✓ Increased sales value by 10 per cent
- ✓ Closed more deals faster
- ✓ Organized all departments with one system
- ✓ Provided quick access into accounts

Dolphin Software, Inc.

Improved Sales Processes Lead to Improved Sales Performance

Dolphin Software, Inc., is a privately owned software company headquartered in Lake Oswego, Oregon. Dolphin Software creates software products and services to help companies ease environmental reporting and mitigate safety, financial and legal risks, by providing a comprehensive, integrated compliance approach to environmental, health and safety regulations. Dolphin Software is now a leading provider of data-management tools for a wide range of businesses that handle, store and use hazardous chemicals.

“Our relationship with Maximizer Software began in 1994 when we were rapidly establishing relationships with companies that needed our software to help manage various environmental, health and safety issues,” said Deb Sepich, Vice President & Chief Operating Officer, Dolphin Software. “In the mid-90’s many companies were looking for ways to reduce unnecessary stockpiles of hazardous chemicals to make their workplaces, communities and the planet safer. Our sales force started getting extremely busy and the demands on their time and resources increased.”

But, like any business that’s moving forward with market demands, Dolphin Software had a vision. “It was clear to us that a strong demand for an integrated approach to environmental, health and safety issues existed. We’re using technology to get ahead of the curve and CRM is a part of our strategy.” said Sepich.

The Challenge

As the demand for Dolphin Software’s products and services grew, so did the needs of its sales and customer service teams, including the ability to accurately and efficiently track sales prospects and opportunities, and customers and accounts. Prior to the introduction of a complete CRM system, the Company’s salespeople used a combination of an internal system, accounting spreadsheets, and an early version of Maximizer’s contact manager. Sales Managers at Dolphin Software, however, desperately wanted the ability to access all of the Company’s customer records through a dashboard and get a quick snapshot of what was going on with any account at any given time. Prior to installing Maximizer Enterprise, sales agents were unable to keep daily logs of outgoing marketing campaigns and sales proposals, and each day they spent more than 10 per cent of their time just organizing contacts and files.

The management team at Dolphin Software formed a CRM steering committee and polled each department on what they needed most from a new CRM system. They knew they wanted to shorten the sale cycle, gain insight into each sale opportunity and its status in the pipeline, and they also wanted quicker access to documents in the database. In addition, the Company needed a solution that would incorporate and enable the sales model that was already propelling them to success.

About Maximizer Software

Maximizer Software is a leading provider of simple, accessible, customer relationship management (CRM) solutions, providing the best value for small and medium-sized businesses. Built on a web-based architecture, Maximizer CRM offers sales, marketing, and customer service users and managers their choice of access to customer information – through the desktop, web, or mobile device. Maximizer Software has sold more than one million licenses to over 120,000 customers, ranging in size from entrepreneurs to multi-national organizations, including: Siemens, Société Générale, HSBC, TD Securities, Lockheed Martin, Brian Tracy International, Fisher & Paykel Healthcare, Oxford University Press, and Cathay Pacific. Maximizer Software is a global business with offices and over 400 business partners in the Americas, Europe/Middle East/Africa and Asia Pacific. For more information, please visit: www.maximizer.com.

"In short", said Sepich, "we needed an application that would help us become more responsive to our customers and prospects, and would give our sales teams better opportunities to close more deals."

The Maximizer Enterprise Solution

A reliable product at the right price "We looked at many CRM software applications and even one popular ASP model, and we just felt they weren't applicable," recalls Sepich on the company's search for a proven and affordable CRM solution. Maximizer Enterprise from Maximizer Software struck a chord, however. "Maximizer Software was very competitive with its pricing and we liked how willing they were to work with us to help us solve our business objectives. They treated us like we were their only customer and the training they provided was the best we've ever had."

In relation to these low costs, it was the sheer number of benefits of using Maximizer Enterprise that caught the eye of the CRM steering committee at Dolphin Software. "We felt Maximizer Software had the ability to continue serving our needs at the level we were at and it could continue doing so as our sales volume increased," said Sepich.

The product's easy-to-use interface was another plus. Given that so many of Dolphin's employees had used and were happy with Maximizer when they were using it to keep track of their business contacts, the decision to upgrade to Maximizer Enterprise was a natural choice.

"We wanted a user interface and functionality that our people would adopt and use, rather than something they would find intimidating," Sepich continued. "We believed it was wise to buy a solution that was easy to install and configure, and provided the right level of functionality we needed. We knew we didn't want the over-bloated functionality that some of the larger vendors are trying to pass along to customers in the small to mid-market."

Out-of-the-Box Implementation – Customized Gradually

Dolphin Software decided to implement Maximizer Enterprise first with a few customizations. Then, when the sales and customer service and support departments gained a better understanding of the full capabilities of Maximizer Enterprise, they could more accurately determine which customizations would be most beneficial. This strategy also helped keep implementation timelines and costs to an absolute minimum.

"We kept expanding and after a few months the Maximizer Enterprise user base had grown to include users in each of our departments, including sales, accounting, customer service and support, human resources, and programming and production," said Sepich. "We now have fifty Maximizer Enterprise users and they definitely have a solid understanding of where they want their Maximizer Software system to take them, and the specific value of these customizations."

"Maximizer Software helped put the Dolphin Software's sales team on the same page by organizing the way they communicate. Maximizer Enterprise is adaptable enough to fit Dolphin Software's language and their way of doing business.

"We now have a range of reports to meet the needs of our entire team," Sepich added. "For example, we know that when a deal reaches a certain stage, a sales engineer needs to get

involved. They can look to see what deals in their region are reaching that stage and plan for the anticipated workload."

Maximizer Enterprise has accounted for at least a 10 per cent increase in sales value

"We did not want to spend hundreds of thousands of dollars doing an implementation that was going to take a long time and provide functionality that would never get used," Sepich said. "We bought what we needed and it has performed very well for us. I am very confident that without Maximizer Enterprise we would not have closed as many deals as quickly as we have. Maximizer Enterprise has increased our average sale value by about 10 per cent. That means it allows us to manage our accounts more effectively and get more out of each lead," she continued.

As a result of Dolphin Software's on-going commitment to technology, the Company increased its revenues by fifteen per cent and was listed on the Deloitte & Touche Technology Fast 50 for a seventh year in a row.

"We got what we thought we were going to get, at a price that has provided a great return on investment. It was the right business decision and we have not looked back at our decision," said Sepich.

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