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*Mandy Kibler, Director of Administration, South Carolina Department of Commerce*

Industry: Government Agency (Job Creation, Grow Capital Investment)

Location: Columbia, SC

Web: [www.sccommerce.com](http://www.sccommerce.com)



## Key Benefits

- ✓ Improved account manager’s ability to follow up and capture essential communications with clients;
- ✓ Increased team efficiency, confidence, and project success momentum with solid reporting and accountable project management;
- ✓ Created new investment dollars exceeding goal amount by \$62M;
- ✓ Created 42% more jobs than anticipated;
- ✓ Met goal of CRM system installed, in use, and users trained within 30 days

## South Carolina Department of Commerce Tracking and Accountability with Boosts to Investments and Job Creation

**State Department of Commerce systemizes sales cycle, improves client communications and delivers more “wins”, jobs and dollars with Maximizer Enterprise**

Based in Columbia, South Carolina and formed in 1991, the Department of Commerce is South Carolina’s lead agency for the growth and development of business and industry.

Their job: To locate new, quality investments and expand existing investments to create wealth, jobs and help achieve the highest quality of life for all South Carolinians. And they do it well - in 2005, the South Carolina Department of Commerce played a role in the creation of over 12,000 new jobs and capital investment of over 2.5 billion dollars within the state.

As one of five divisions, most economic development comes from the Global Business Development unit. Here, sales manager’s staff are assigned leads, which could include companies thinking of investing in, or manufacturing products in South Carolina or some competitor state. Projects go through 5 phases, with each subsequent phase representing an increase in relationship strength and confidence in turning the project into a “win”.

## The Situation

Competing with big-name states like California and New York for new investment dollars, the South Carolina Department of Commerce attempts to set itself apart with proactive follow up to potential investors and the message, “It’s economical to manufacture here”. In addition, South Carolina offers a cost of living below the national average, nearly 40% less than California.

Yet, with over 20 sales and project managers tracking over 278 individual potential investment projects and their progress in non-standardized Excel documents, status reports and useful statistics were hard to come by. With no official reporting or sales tool available to them, the team floundered to produce even “soft” numbers for their weekly and monthly status reports. Worse, leads were falling through the cracks when one project manager thought another was managing the account. There was no central data repository that showed what the team -- or any particular individual -- was doing. The message that South Carolina offered great value to investors was getting lost.

Fast forward to February 2006. Columbia businessman Joe E. Taylor, Jr., was appointed as

## 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](http://www.maximizer.com).

the new Secretary of Commerce. A man with a strong business background where several expensive sales reporting, workflow and CRM tools were status quo, Taylor set a concrete goal for his IT department with respect to CRM tools. They were to research, test, and implement a solid customer relationship management and reporting system for the Global Business Development unit within one month – including getting the team trained up and using the system.

## Solution

Faced with a tight deadline, Department of Commerce IT manager Mark Heaton knew he had to act fast. As he considered his options, he knew he needed a system that was affordable, easy to implement, and didn't require huge changes in work flow. As a bonus, he was looking for a system that could grow as needed, meaning he could add more seats as other business units came on board.

His search led him to Maximizer, and it was their customer support team that helped win him over: "I was personally very pleased with the quality of response and support we've received from Maximizer," says Heaton. "From the initial contact, through installation, to our in-house user training, the Maximizer team was responsive and very helpful. We couldn't have met our tight timelines without such quality support."

Installation was simple: "We had the database built, users logged in, and initial training sessions completed within the first week" says Heaton.

Because the adoption of a CRM system was mandated from above, Director of Administration Mandy Kibler anticipated some resistance: "The team was hesitant to accept a new tool because they knew their workflow would possibly change. With Maximizer's flexibility, their workflow changed minimally, and the team adapted easily," she says. With more than 7,500 customers, Maximizer Enterprise is the industry's most popular and proven customer relationship management product. Because Maximizer integrates easily with tools like Microsoft Outlook® and Business Objects Crystal Reports®, it provides organizations like the South Carolina Department of Commerce with affordable, flexible, yet complete sales, marketing, and customer service functionality without reengineering their existing business processes or changing their preferred software tools.

"Maximizer Enterprise is designed to improve the efficiency of your sales process and help you capture essential client communications – both of which can make the difference between sealing the deal or not," says Peter Callaghan, Chief Sales Officer, Maximizer Software.

## Capturing Essential Communications

Before Maximizer Enterprise, project managers tracked project status and client communications independently and inconsistently. Today, project managers have secure, password-protected access to a browser-based portal that interfaces directly with the Maximizer Enterprise system. It's easier for teams to collaborate and stay up to date by capturing valuable client information that's easily accessible for the next interaction.

What sets Maximizer apart is that it's a total package," comments Heaton. "Using Maximizer, we can see every bit of communication that's occurred on a project from every level. If our lead team member is away, we're able to see project status and give key update information when it's needed. If the project manager is on the road, the web interface allows them to log in to check status or update details of their latest meeting. For

potential investors, this level of customer service furthers the reputation of South Carolina as a great place to do business.”

## Workflow Tool Ensures Consistent Follow-Up

Using the Maximizer Workflow Automation tool, the sales team’s efforts were made simpler and more consistent. By breaking down the sales process into concrete steps within Maximizer, it not only reinforces the process in the minds of the team and organization, but allows the system to send reminder pop-ups for follow-up contact and other critical action steps. As a result, managers save time in completing and assigning tasks while clients receive more proactive, consistent service. “The Workflow system is almost transparent to users so they don’t feel like the system is creating extra work for them to do,” says Kibler. “This is essential for buy-in.”

Using Maximizer’s Executive Dashboard, users see a high-level, real-time snapshot of department performance and tasks from a single screen. Users can customize their Dashboard to contain information that’s relevant to them. For example, Directors see all investments in the pipeline while individual project managers see all prospect calls scheduled for that day.

## Reporting Further Successes

Reports – and the ability to make better decisions with the information contained within them – are key to the Department of Commerce’s success with Maximizer.

Maximizer makes use of Business Objects Crystal Reports and additional reports are easy to set up. IT Manager Mark Heaton is impressed with the support he received: “The Maximizer team is available to help you get the most out of your system. If we weren’t able to pull the data we wanted using default reports, the Maximizer team supplied the technical support to meet our needs.”

Mandy Kibler is also pleased with Maximizer reporting: “As we approach our first six months of Maximizer use, the biggest gain is our ability to provide confident reporting with hard numbers. We’d never have been able to pull this type of information out of our project managers without it. In addition, by knowing which projects became wins in which phases and why, we now have the ability make more wins by strengthening our message to companies looking for the same type of incentive.”

## Return on Investment

With 60 seats of Maximizer Enterprise in house, the South Carolina Department of Commerce has realized a substantial return on their investment since launching the system in April 2006. Results for 2006 already show a 26% increase in “wins” over their goal for the year. In fact, the total number of new jobs created in the first 10 months of the year has already surpassed the entire total from the previous year and will likely top out just under 16,000.

“After having Maximizer steps integrated into our project manager’s task workflow for over six months, executive meetings are shorter and more efficient. We know with certainty who has which leads and projects and which phase they’re in. Before that, it was next to impossible to locate that information in one reliable, centrally located place.”

More importantly, the team has experienced an increase in satisfaction in using the system: "They're more efficient, they're seeing the benefits of a CRM system, and using it more and more. Each team member effectively becomes an individual champion for the system throughout the organization" says Kibler.

Since deploying Maximizer, the South Carolina Department of Commerce has:

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"As an agency dedicated to improving the quality of life and economy for the people of South Carolina, we can't believe we waited so long to get a CRM system in place." -Mandy Kiebler, Director of Administration, South Carolina Department of Commerce

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