



**Company Information**

Industry

Publishing

Location

Cape Town, South Africa

No of users

10

Maximizer Product

Maximizer CRM 10

Entrepreneur

**“A task that used to take a week now only takes an hour!”**

- Gill Siebert  
Research Manager  
Triologue

**Triologue saves time with Maximizer CRM**

Established in 1999, Triologue is a leading consultancy and publisher, driving the development and management of knowledge within the sustainability and corporate social investment arenas. The company has several divisions each with different functions which service many different clients. Prior to implementing a CRM system, this client information was stored across many Excel spreadsheets. “Trying to bring everything together was a nightmare!” explains Research Manager, Gill Siebert. “The spreadsheets were all maintained by individual employees and were all formatted differently.”

**Making the right CRM choice**

This resulted in the company deciding it was time to implement a CRM system. Triologue looked at a variety of systems including MS Access and Microsoft CRM. “Many of the systems we looked at seemed very complex,” says Gill, “We’re a small organisation with 12 employees and Maximizer CRM seemed well-tailored for a company of our size.” In comparison to other packages, the cost to implement Maximizer was also well-matched.

Triologue enlisted the help of Maximizer partner Camsoft Solutions to help them roll out the implementation. “There was a lot of internal resistance at first,” says Gill, “but after the initial training, employees have really started to appreciate the value of the product.” With all staff now up to speed on the system, the roll out has actually been much smoother than originally anticipated and the company is now reaping the benefits of the system.

**Greater productivity, higher efficiency**

Maximizer’s address book functionality is already paying dividends. The most significant change is that all client information is now in one central location, which makes it easier to manage and keep up-to-date. This has helped greatly with productivity levels, enabling staff to achieve higher levels of efficiency. “When we’re

publishing a new book we can use the User Defined Fields to flag who should receive complimentary copies,” explains Gill. “It used to take a week to identify the recipients, bring them into one list and print out the address labels. Now it probably only takes an hour!”

As well as the address book, Gill says that they are also using Maximizer’s Hotlist Task function which allows the user to schedule reminders and tasks. The staff member in charge of driving sales is also using the Opportunity Manager and is very happy with it. “Sales can now report on the opportunity information and draw graphs from it,” says Gill. “This is really beneficial to the business as now we can track exactly how we are doing in any sales cycle at the press of a button.”

**Looking ahead with Maximizer**

At the moment Maximizer is covering all of Triologue’s basic needs, but it won’t be stopping there. “The next step is e-mails,” says Gill. “We’re starting to send e-mails via Maximizer so that we can track and record all communications.” This will mean that all staff will not just be able to access basic client information, but be fully conversant on previous conversations too. This in turn will allow them provide a better service to clients. Overall Triologue is very happy with the Maximizer CRM system. As Gill states “It has added immense value to the business, certainly more than we anticipated, and especially in terms of time saved and increased efficiency.”

**Key Benefits**

- Information all stored in one central location
- Higher level of productivity and efficiency
- Ability to track sales performance at the press of a button

**For More Information**

Contact us to learn how we can help you accelerate your CRM success.

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**About Maximizer Software**

Maximizer Software is a leading provider of simple, accessible, customer relationship management (CRM) solutions, providing high value for small and medium-sized businesses, and divisions of large enterprises. As a pioneer in the CRM industry for more than 20 years, Maximizer offers sales, marketing, and customer service staff and business leaders access to customer information through a Web browser, a mobile device or on their desktop. Maximizer’s CRM solutions enable organizations to accelerate business growth by centralizing customer information and streamlining processes, while exceeding client expectations. Maximizer Software has sold over one million licenses to more than 120,000 customers, ranging in size from entrepreneurs to multi-national organizations, including: Cathay Pacific, Fisher & Paykel Healthcare, HSBC, Ipsos Canada, Oxford University, Siemens, Société Générale and TD Securities. Maximizer Software is a global business with offices and business partners throughout the Americas, Europe/Middle East/Africa and Asia Pacific. For more information, please visit: [www.max.co.uk](http://www.max.co.uk).