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Greg Brownless, Vice President, Sales & Marketing, VITA-TECH Canada Inc..

Industry: Healthcare

Location: Toronto, ON

Web: www.VITA-TECH.com



Key Benefits

- ✓ Grew annual revenues by more than 20% with core client base
- ✓ Faster customer service response times
- ✓ Created a feedback loop for sales to accept leads and follow-up more quickly with clients
- ✓ Sales now closes a majority of the deals on which they quote
- ✓ Captured significant percentage of the market share

VITA-TECH Canada Inc. Invests In CRM to Improve Customer Relationships

VITA-TECH Canada Inc. is Canada's largest provider of diagnostic testing and laboratory services for veterinary, institutional, and regulatory government bodies. VITA-TECH started small, serving clients in the Greater Toronto area and now extends its services to the United States, the United Kingdom, and Europe. A multi-disciplinary customer service department supports the Company's size and reach. To support this growth and to better manage their exiting clients, VITA-TECH implemented a company-wide customer relationship management (CRM) system that has made it possible for employees to deploy a wide range of sales, service, and marketing capabilities.

The Challenge

Some of VITA-TECH's key clients had complained they felt the Company was becoming too big to care about their individual needs. Employees were hearing from some customers that they were growing out of touch with the family values on which the provider of veterinary diagnostic services was founded; an emphasis on customer care, they said, was being replaced with slower responses to inquiries as the Company grew in size and expanded into new and international markets. "Maintaining and even improving our high-level of customer care as we grow our business is our number one objective," said Greg Brownless, Vice President, Sales & Marketing for VITA-TECH. "Coordinating communications between departments and developing processes to address customer care issues was not something we'd done anything to improve. Our veterinary clients are the life-blood of our operations so we decided to invest in CRM technology to help address some of our customer care issues before they became a problem."

Implementation

After Brownless talked himself hoarse extolling the virtues of a CRM system, VITA-TECH's President Alfred Choo selected Brownless as the Company's CRM Project Manager. Brownless was chosen for this role because of his "hard-core project management skills and passion for success". "The executive team at VITA-TECH has shown a great commitment to using technology to be successful. They gave me the tools, people and time needed to make our CRM implementation successful," says Brownless, who also reports to Choo. "We don't expect Maximizer Enterprise to make money for this company, but we expect our people who use Maximizer Enterprise to be better equipped to make the difference.

Brownless met with employees to spread the word about the upcoming CRM implementation and to discuss each department's needs and expectations. "I wanted to gain a better feel for their environment," says Brownless. "What are their challenges? What

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.

are their limitations? What does CRM mean to them?"

Brownless recognized that any level of change within the organization was bound to create some uncertainties, especially with employees who had their own way of doing things. As Brownless addresses the change-management issues at VITA-TECH, he continues to emphasize that change is a good thing.

"I wanted to make sure each user understood the benefits of integrating all of our sales, marketing, and customer service and support information into the Maximizer Enterprise database. Our sales team loves it because they now have so much more information about customers right at their fingertips, allowing them to interact on a much more personal level, which is the way we used to do things when the organization was smaller."

Even though Brownless selected a CRM system that has a very user-friendly interface, he made sure each employee received adequate training, a total of eight hours in all for each employee. But the real key to adoption was accountability. "Now we take the sales teams' assigned leads and put them into our CRM system. Each salesperson gets a daily reminder to follow up on those leads. It's been a useful tool."

VITA-TECH worked with the Customer Continuum Group, a Maximizer Software Certified Solution Provider in Toronto, to implement Maximizer Enterprise throughout the organization. Customer Continuum Group used what President Bruce Russell calls a Discovery Process to develop a clear understanding of VITA-TECH's business objectives and how a CRM solution would fit into those objectives.

"To ensure the implementation was a success we looked at VITA-TECH's history on customer sales data and shadowed their sales reps on calls to get a complete understanding of its sales methodology," said Russell. "VITA-TECH went live with the solution in May and we are now working with VITA-TECH to connect the CRM system to their laboratory diagnostic system, order entry and accounting systems."

The Maximizer Enterprise Solution

Brownless estimates he evaluated half a dozen CRM systems, including on demand solutions such as salesforce.com. However, Brownless decided on Maximizer Enterprise 8, which he felt had much more functionality than ACT and GoldMine, and was a lot more customizable than salesforce.com. At the same time, Brownless wanted a system that would integrate easily with existing Microsoft technology already in place at the Company. When he evaluated CRM systems from SalesLogix and Onyx, Brownless found they were much more expensive and harder to use than Maximizer Enterprise.

Results

VITA-TECH's staff has grown their annual revenues by more than 20% with their core client base since installing Maximizer Enterprise. Today all of VITA-TECH's employees use Maximizer Enterprise to create sales effectiveness. From sales and marketing to veterinary researchers, customer support, quality assurance, and internal administration, VITA-TECH uses their CRM system for everything from managing sales to scheduling laboratory testing, coordinating specimen pick-ups, and handling support calls—even tracking office supplies and noting the number of test tubes in each supply office.

As the customer service team grew more confident in their use of the CRM system,

customers began noticing an improvement in service and faster response times. The client base then started purchasing more services from VITA-TECH, so existing accounts became even larger. The ability to capture inbound inquires and share information has built a feedback loop for the sales force and customer service team to accept leads and follow-up more quickly with clients. And during one very busy time in 2004 when competitors were offering price reductions on similar services, VITA-TECH was able to retain \$100,000 worth of business through a program that was generated and managed using their CRM system.

VITA-TECH has achieved close to 100% user adoption and is seeing hard benefits from their use of CRM. In addition to improved customer service levels and an increase in repeat business, the Company's revenues and profits are continuing to grow. VITA-TECH's salespeople now close a much higher percentage of the deals they quote on and the Company has captured a significant percentage of the market.

"When you demonstrate confidence to your client base they will buy more from you. It's very clear to us the significant improvements we've made in customer care have not gone unnoticed by our customers," said Brownless.

Brownless upgraded to Maximizer Enterprise 8 in 2004 and is even more excited about what he can do with the new workflow capabilities, detailed reports, and sophisticated analytics that are available to him.

"CRM is a key building block to our continued success in the future," he says. "When we started thinking about CRM we knew we had to put on our visionary hats. Our CRM system costs about seven hundred dollars per person. By investing in CRM we are investing in our future."

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