



**CASE STUDY**

# PSI Fluid Power

| HYDRAULIC COMPONENTS AND SERVICE



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 **MAXIMIZER** CRM

# PSI Fluid Power Pumps Up Sales Activity with Maximizer Mobile CRM

Primarily focusing on industrial and mobile markets, PSI Fluid Power specializes in serving manufacturing, forestry, mining, drilling, transportation, and agriculture industries. To optimize the overall sales process and leads tracking, as well as empower its sales force with the latest customer and prospect data, PSI Fluid Power sought a comprehensive CRM provider with both desktop and mobile capabilities.

## Challenge

PSI Fluid Power has a dedicated and mobilized sales team, comprising 12 outside sales representatives and 12-15 inside sales representatives who work tirelessly to generate new leads and maintain active touch points with their prospect pipeline. Completing four to six sales calls or meetings per day out of approximately 150-200 customers in their respective lists, they were struggling to stay organized and recall all the important details of an account before connecting with the prospect or customer contact. They needed the latest customer information available at their fingertips, regardless of the time or place they were working during their day. Additionally, they required a way to centrally capture the details of all sales calls and meetings.

After evaluating a number of market-leading CRM solutions, PSI Fluid Power chose Maximizer CRM in 1999 to be implemented in its Vancouver office and then adopted it company-wide. PSI Fluid Power has been utilizing the latest Maximizer CRM desktop software and Maximizer Mobile CRM since October 2008, All sales team members

## KEY BENEFITS

- **Optimized sales process and leads tracking**
- **Data transparency**
- **Desktop and Mobile CRM for anywhere access**
- **Centralized repository of details from sales calls/meetings**

are equipped with BlackBerry devices and company policy requires all employees to use Maximizer.

## **Solution**

PSI Fluid Power selected Maximizer's best-in-class CRM and Mobile CRM solutions for the following reasons:

### **Maximizer CRM**

- Whether delivered via the Windows desktop, web access or mobile application, Maximizer provides a centralized and secure location to access up-to-date customer/prospect information.
- Enables both outside and inside sales teams to handle more customers/prospects and engage in more proactive outreach with less time researching the last interaction
- Precise forecasting and collaboration with up-to-date information shared from the entire sales force
- Ability to coordinate, initiate and track success of marketing campaigns including ROI measurement

### **Maximizer Mobile CRM**

Reduces staff downtime with access to customers, leads, opportunities and cases — in places where a laptop may not be convenient or practical

- Increases customer face time by enabling unprecedented field productivity
- Builds stronger prospect/customer relationships with sales reps knowing up-to-date background and the latest details before a call or meeting
- Improves sales forecast accuracy through real-time updates from the field

“With every moment of customer interaction time critical to our livelihood, Maximizer Mobile CRM helps us hone in on opportunities by filling in the gaps between scheduled sales calls and visits,” said Parker Lancaster, president, PSI Fluid Power. “Our number of sales touch points has increased substantially.”

## **Results**

Since PSI Fluid Power began using Maximizer, overall sales have increased and sales productivity and activity reporting have measurably improved. Key results include:

### **More Sales Calls and Improved Sales Force**

**Agility** – The sales team has significantly increased their number of sales calls and bumped up the number of outside sales visits by thirty percent. Additionally, the outside sales team operates more nimbly, easily accommodating last-minute meeting changes on-the-go, by using Maximizer Mobile CRM to shuffle times or to check which customers fall within a certain mileage radius of their location for a last-minute visit in place of a cancelled appointment.

**100% Organized & Prepared** – Armed with the latest customer information, notes from previous meetings, and even key personal information, PSI Fluid Power's sales team has valuable real-time knowledge available at their fingertips and can hone in on the most important issues to further customer relationships or bring prospects a step closer to signing on the dotted line.

**Collaborative Problem-Solving** – By logging all customer challenges and solutions within Maximizer CRM, the sales team can now leverage lessons learned from all team members and apply relevant solutions to



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**PARKER LANCASTER**

President, PSI Fluid Power Ltd.

similar customer situations. This enables the sales team to focus on the number one priority of building strong customer relationships and delivering swift guidance when issues arise.

**Bolstered Marketing Campaign Traction**

– With the help of Maximizer CRM’s built-in Campaign Manager, PSI Fluid Power now efficiently executes targeted marketing campaigns. With clearly tracked metrics visible at a glance, they can review results and adjust tactics as required to optimize campaign ROI. For example, the company successfully used Maximizer CRM to inform targeted prospects of an open house-style sales event in Vancouver, driving strong attendance with no cost to send the emails.

Added Lancaster, “Maximizer CRM is our key to saving time and money during the sales cycle by serving as our customer knowledge center. It also bolsters our sales team’s confidence because they know they have all the background information required to deliver top-notch service during a prospect or customer interaction.”

As a next step, PSI Fluid Power plans to integrate Maximizer CRM into Traverse, the company’s Sequel Server-based accounting system.

## About Maximizer

### Maximizer CRM is fueling the growth of businesses around the world.

Our CRM solutions come fully loaded with the core Sales, Marketing and Service functionality companies need to optimize sales productivity, accelerate marketing and improve customer service. With flexible on-premise, our cloud and your cloud deployment options, tailored-to-fit flexibility, state-of-the art security infrastructure, industry-specific editions and anywhere/anytime mobile access, Maximizer is the affordable CRM solution of choice.

From offices in North America, Europe, Middle East, Africa and AsiaPac, and a worldwide network of certified business partners, Maximizer has shipped over one million licenses to more than 120,000 customers worldwide.

## Our Customer



### PSI Fluid Power

Providing superior hydraulic components and service for more than 35 years, PSI Fluid Power delivers system design, components, repairs and testing. With more than 2,000 customers spanning more than 10 countries and territories, the company's 60 employees report to corporate headquarters in Calgary, Alberta, with distribution facilities in Calgary, Edmonton, Red Deer and Vancouver.



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