CASE STUDY

eXception VAR

| ELECTRONIC MANUFACTURING

eXception VAR Europe puts customer communication at the heart of operations with Maximizer CRM

"eXception puts customer communication at the heart of our operations, working in partnership to gain a deep understanding of customers' businesses and industries, drawing on our experience of the global outsourced marketplace," says Rob Phillips, customer services director, eXception Group. "This is essential to working effectively with them throughout every stage of the process, from product design and development support, through design for manufacture to prototyping and preproduction."

The group puts tremendous effort into this approach and wanted to extend its 'Knowing our Customer' culture to its sales and marketing processes, shifting from a transactional to relationship model, and with a strong emphasis on customer service.

"We decided to implement the concept at eXception VAR Europe first, and when the solution's business case has been proved, extend it to the rest of the Group. The Winman ERP system we were using was fine for tracking orders placed on suppliers, but we needed a centralised and easily accessible CRM system that could streamline sales and marketing. Automation of commercial workflow, such as quotes production, and reducing reliance on spreadsheets, paper and whiteboards were priorities. Sales force automation, with provision of full customer data through Blackberrys, laptops and desk-based access was also important, together with detailed tracking of quote and order pipelines, so that the ratio of quote to order conversations could be increased", says Rob.

KEY BENEFITS

- **Greater insight into customers by viewing profile and quotes**

- **Robust security, ensuring customer data cannot be downloaded to external devices**

- **Increased visibility of team performance through dashboards**

- **Real time Management reporting: key metrics ensure reliable and real-time Key Performance Indicators (KPI) tracking, to make informed decisions and take early corrective actions when required**

- **Dashboards and tasks help to prioritise and plan the day, reducing downtime.**

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MATTHEW-PAUL JENNINGS
Supply Chain Analyst, eXception Group

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Why Maximizer CRM?

eXception applied its internal project management expertise to coming up with a solution, setting up an evaluation team led by Rob and Supply Chain Analyst, Matthew-Paul Jennings. The first step was to establish whether the existing ERP system could be extended to incorporate CRM, but while it had the capability to add customer contact details and so on, it was limited in its scope to deliver a 360° view of the customer relationship. Another drawback was that it had limited mobile functionality.

Maximizer Elite Business Partner, QiC Systems' investment in Google pay-per-click paid off when eXception linked through QiC Systems' website to the Maximizer online test-drive. After scanning the market, the team agreed on a shortlist of three: Maximizer, Goldmine and Sage ACT.

Matthew-Paul explained "I had become familiar with Maximizer at a previous company, so knew the software's capabilities. My experience was that it was reliable and easy to modify, while evaluation of the latest version[*] – Maximizer CRM11 – revealed an impressive rate of product evolution, in terms of new features and improved user experience. We did consider a cloud-based solution, but as we handle customer IP (Intellectual Property) associated with PCB designs, concerns about security ruled out a SaaS approach. The fact that Maximizer CRM can be customised to block downloads of customer data onto USB sticks and other portable data devices was a key consideration".

[*] latest release at the time of success story completion

Following evaluation, the team decided in favour of Maximizer CRM 11, on the basis of the quality of the user experience, its dashboard functionality, trust in the company and pace of product development, together with security and choice of access. Matthew-Paul and Rob were able to test actual usage scenarios, customise the software and provide tangible evidence to managers and key users that Maximizer was flexible enough to meet their needs and that only minimal training would be needed before deployment.

"The Maximizer dashboard module was particularly relevant to eXception", adds Matt Wood, sales director, QiC Systems. "The test drive showed the evaluation team the power and flexibility of the system and how easy it would be to customise the content and personalise the appearance of the dashboards, all without the need for external support."

The implementation

The contract for the 15-user system was signed in mid-February, and following implementation over the last two days in March, went through a soft-launch with a small number of users before full deployment across the Calne site on 2nd May.

QiC Systems installed Maximizer CRM 11 on the eXception server, imported the initial data, and trained Matthew Paul Jennings in setting up and using defined fields to gather and manipulate customer data. In addition, QiC Systems carried out three days of training, split down into a series of two-hour sessions, for other eXception personnel who would be using the system. It is a testament to the ease of customisation that the eXception team was pretty well self-sufficient from then on.

Maximizer in action

Change has to be managed carefully, regardless of the line of business and there was some initial concern among users about how well an 'off -the-shelf' CRM package could cope with eXception VAR Europe's specific processes. But they were soon convinced.

"I needed just a couple of hours' training from QiC Systems and I have found Maximizer really easy to use", says Clare Buchanan, Key Account Manager for eXception VAR Europe. "It gives me quick access to the information I need and helps me track where I am with customers and actions. I use the dashboard as a personal productivity tool, helping me prioritise and plan my day, highlighting what

I need to follow up. Crucially, it gives me greater insight into my customers, as I have access to all their previous quotes, together with the profile information that the sales guys have built up."

eXception sales personnel also liked the choice of access methods via a desktop PC whilst in the office or smartphones and laptops when on the road. Field sales staff appreciate MaxMobile on their Blackberrys, especially when selling in to larger, multi-site accounts. One sales executive, for example, when sent to the wrong location by a new customer, was able to pull up details of the company sites and contacts, find them on Google Maps and still get to the right building in time for the meeting.

The results

A number of business benefits are being recognised, not least of which is a much increased visibility of performance across the operation. It is easier for key account managers or sales executives to cover for illness or holidays as customer information is readily accessible – no more hunting around for paper notes or individual spreadsheets. Maximizer has been integrated with Outlook for email and electronic diary and users

report personal productivity gains, freeing up time that can be spent on building customer relationships.

Management reporting is very much improved, both in terms of speed of turnaround and richness of content.

The effort involved previously in producing sales reports for circulation among the senior management team, which used to take two days each week, is now viewable on screen and in real time. Key metrics, such as ratio of quote to order conversion, quote turnaround times, progress to quota on customer contacts / visits and revenue targets, ensure that Rob is able to track KPIs and take early corrective action when required.

The future

"Later this year, Maximizer CRM will be rolled out to the rest of the group in the UK, as well as to eXception VAR Asia in Penang", concludes Rob. "We are also investigating how we can use it to automate the workflow involved in expediting orders placed with our Asian suppliers. In addition, the team is looking at ways of leveraging the marketing module as a platform for permission-based marketing campaigns."

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

eXception VAR

The eXception Group is a leading PCB (Printed Circuit Board) and Contract Electronics Manufacturing services provider to the global electronics industry. The Group has four individual but complementary businesses:

- eXception PCB, which is focused on fast turn PCB manufacturing in the UK
- eXception VAR Europe, providing managed off shore PCB sourcing and supply chain management
- eXception VAR Asia, delivering turnkey PCB sourcing for the South East Asian market
- eXception EMS, which specialises in rapid prototype and small volume assembly, through to comprehensive outsourcing manufacturing solutions.

Currently, eXception Group employs over 300 people at Calne and Tewkesbury in the UK, Penang in Malaysia, Mumbai in India and Chicago, USA

MAXIMIZERCRM

AMERICAS (HEAD OFFICE)

Maximizer Services Inc.
208 West 1st Avenue
Vancouver, BC
V5Y 3T2   Canada

Sales +1 800 804 6299
Phone +1 604 601 8000
Email info@maximizer.com
Website www.maximizer.com

EUROPE / MIDDLE EAST / AFRICA

Maximizer Software Ltd.
1 The Courtyard, Eastern Road
Bracknell, Berkshire
RG12 2XB   United Kingdom

Phone +44 (0)1344 766 900
Email enquiries@maximizer.com
Website www.maximizer.com/uk

AUSTRALIA / NEW ZEALAND

Maximizer Software Solutions Pty. Ltd.
Level 1, Suite 14, 32 Delhi Road
North Ryde, New South Wales
2113   Australia

Phone +61 (0)299 572 011
Email info.anz@maximizer.com
Website www.maximizer.com/au

WWW.MAXIMIZER.COM