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*Bill Stroll, Sales & Marketing Manager  
StepForth Placement, Inc.*

Industry: Services – Business

Location: Victoria, BC

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



#### Key Benefits

- ✓ 20% year over year growth in sales
- ✓ Greater forecasting capabilities
- ✓ Improved productivity, especially with processing client proposals and quotations
- ✓ Enhanced client relations due to more personalized service

## StepForth Placement Inc.

**Maximizer chosen over ACT! and Goldmine for StepForth's Contact Management System**

In the embryonic world of search engine marketing, StepForth Placement, a company that provides search engine optimization (SEO) services, understands the need to move fast and keep up with the pace of business. It requires constant attention to detail and quick response procedures, especially to changing search algorithms. Having outgrown the capabilities of their basic office programs, the company purchased Maximizer, a contact management solution that gave StepForth the power and speed required to achieve the company's business objectives. With the help of the new system, Stepforth achieved a healthy 20% increase in sales over the previous year.

According to Bill Stroll, Sales & Marketing Manager at StepForth and the person who spearheaded the implementation of Maximizer, “Maximizer has no doubt lived up to expectations in our company. Given my previous experience with ACT! and GoldMine for over 10 years at other companies, I knew our company would require a faster and more effective contact management system. After reading about Maximizer on many different web portals and user groups, I knew it would be the right purchase for our company. In fact, Maximizer went above and beyond as it contributed to a 20% year over year sales growth. Maximizer also helped our company provide more frequent and timely communication with our prospects and clients. After all, it's in our best interests if we can help our clients achieve measurable results in a given timetable and budget, because word-of-mouth referrals make up a large percentage of our new business.”

Since 1997, about the same time the first search engines were cataloging the early web, StepForth Placement has been providing professional search engine optimization (SEO) and placement services for small- to medium-sized businesses around the world. SEO, in its simplest terms, is a set of methods aimed at improving the ranking of a website in search engine listings, such as Google, Yahoo, MSN and many others. These listings can include pay-per-click (PPC) advertisements, paid inclusion listings, and organic search results. SEO and SEO consultation is multifaceted, as it requires a thorough understanding of a company's business, it's goals and objectives, it's website structure - not to mention a deep understanding of search algorithms used by search engines. StepForth needed a way to track all of these elements so it could effectively communicate to its clients and draw up suitable proposals. Because of the varied services StepForth provides, the company needed a solution to break these services down and track the “sales” of each service. Finally, it also needed to track the phase a client was in (i.e. keyword analysis, setting up PPC campaigns, etc.) so it could effectively forecast sales for a

## 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).

given month or quarter.

## Basic Office Programs No Longer Cutting it

StepForth had been using Excel® and Outlook® to manage their business but were struggling to maintain organization and keep up with the demands of its business. “With the search engine marketing world changing rapidly and our clients constantly seeking ways to attain an optimal web presence, we needed a better system in place to align ourselves with our clients’ goals. Though Excel and Outlook are excellent programs, we couldn’t associate documents to client contact records, we couldn’t track emails to specific records, nor could we relate our reseller records to specific client records. The system or lack thereof, was no longer effective for what we needed. Turning to the web in search of a more comprehensive solution, I came across numerous articles written about Maximizer. Impressed by what I read and the awards and accolades Maximizer was receiving, I downloaded a trial. Convinced the functionality in Maximizer would help us achieve our objective of increasing sales, we decided to implement this contact management system”, says Stroll.

## The Maximizer Solution

Though StepForth was using Outlook and Excel to track client and prospect information like addresses, phone numbers, notes and appointments, the company hadn’t realized the full potential a contact manager could bring to their company – communication and sales management. For communication, Stroll’s team immediately took advantage of Maximizer’s strong integration with Microsoft productivity tools like Word, Excel and Outlook. Having already established a set of custom fields in Maximizer identifying the details of a client like date of contact, proposal number, and currency, StepForth created a number of template documents that merged these custom (or user-defined) fields directly from Maximizer into Word. “This instantly reduced the time to prepare website reviews and quotations as these ‘hot’ fields are populated automatically into these documents. It also helped minimize typos and inaccurate data. Furthermore, by having Maximizer integrate with our Outlook program, we can save email correspondence to the relevant client records in Maximizer, maintaining a history of communications with them. Also impressive is Maximizer’s related entries feature. Now we can relate our resellers to client records so we can have quick 1- or 2-click access to these records!”

For sales management, StepForth has greatly utilized Maximizer’s Opportunity Manager to track sales of StepForth’s varied services. Today, services like Consultation, Keyword Analysis, Competitive Analysis, SEO Campaigns, and PPC Campaigns are tracked throughout the sales cycle (what Stroll refers to as “phases”) from the initial contact to signing the contract. “With Maximizer, we are now in a better position to determine when money will be coming in. By tracking our services and phases in Maximizer’s Opportunity Manager, I can quickly run a number of reports that give us a snapshot of our business. For example, the forecast analysis report can forecast sales for the following month, two months, or full quarter. As a Sales & Marketing Manager, this is very useful as I can plan and budget accordingly for that time frame.”

As a small business operating globally, it’s imperative that StepForth stays on the

cutting edge of technology, especially given that it works with clients to optimize their websites and gain optimal web placements on search engines. Knowing this, Stroll focused StepForth on implementing a contact management system like Maximizer into its company. As a result, StepForth saw a 20% increase in sales, improved staff productivity, greater organization, and improved customer relations - a very important consideration in a business that relies extensively on word-of-mouth referrals. "Maximizer is my centralized source for information. I use it in meetings, on the phone, to compose emails, notes or proposals, to research, retrieve and update prospect and client data, and to keep track of sales. I feel more organized and confident with Maximizer and I've seen tremendous improvements to the way our business is run. After all, if the program helped us attain 20% growth in sales over 1 year, I'm excited about the possibilities this program will help us achieve in the next 2, 3 or 4 years from now. With Maximizer's continuous innovation and evolution, I have no doubt that our company will continue using and growing with this system."

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