

Case Study | Boshoff Visser
Group

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The Boshoff Visser Group of companies is an auditing and financial services group that offers a comprehensive range of financial services to clients from its myriad offices in the Southern and Western Cape of South Africa. Billing itself as a financial services "one-stop-shop", the company is made up of two main divisions: Financial Services and Auditing. The group, which employs in excess of 100 staff members, describes its people as its greatest asset, with personnel both fully trained in the relevant disciplines and comprising qualified chartered accountants, university graduates, and financial planners - many of them with years of experience in the industry. Boshoff Visser is an equal opportunity employer and stresses that it does not hesitate to employ people from all walks of life, as long as they meet the group's requirements for ability, ambition and integrity.

Five-year itch

Last year the company, which previously used a semi-automated CRM system, decided it needed to upgrade to a CRM system that would enable electronic filing of all communications, advice and documentation of all information that is shared across a wide area in the Western Cape. This was prompted in part by legislative change regarding storage of client records, as well as Boshoff Visser's objectives to improve customer care, productivity and revenue.

The search for a CRM system can be a daunting task, but Boshoff Visser says having looked at three different packages including Spotlight and Microsoft CRM, the decision to go with Maximizer Enterprise was a no-brainer. In the summer of 2006, the company implemented Maximizer Enterprise 9 into its Financial Services division to achieve these objectives. The group has been delighted with the results, stressing that electronic filing tackles space issues (no more hefty paper files lying around) and makes information much easier to locate, thereby improving the overall efficiency and productivity.

Care package

The system also helped its customers to feel more secure, knowing that their data was safely stored and easily accessible. In fact, Maximizer Enterprise has enabled the group to really boost customer care and efficiency, with staff able to access client data remotely when visiting customers at their offices. "The data is very easy to find," comments Kearney Theron, Chief Executive Officer, "The whole customer portfolio is electronically stored and can be retrieved easily in the office and on customer site. It couldn't be simpler."

Track and sell

With the company now able to track and monitor its flow of business, it is also finding Maximizer Enterprise priceless as a management tool. "Being able to analyse all our data is a real bonus," comments Kearney. Another significant benefit for the group has been the ability to cross-sell products and services. Via Maximizer Enterprise, Boshoff Visser's financial consultants are able to get a clear, easily accessible picture of what services clients are already using and what services they might benefit from in future - enabling pitches to be made at the appropriate time. In fact the company has grown 20 % in the past year, and attributes a healthy percentage of this growth (25%) to their benefits achieved using Maximizer Enterprise.

Easy does it

Not only was Maximizer Enterprise easy to implement, data can be easily synchronised between their six offices and it can also be easily customised to fit the company's needs as it continues to grow and develop. "Many of the other systems' features are similar, but Maximizer was easier to fine-tune to the way we do business," explains Kearney.

The simple life

The product's ease of use was also a draw. With staff from "20-year-old geniuses to 55-year-old professionals who do not have a long history of computer use, the product had to be easy for some and fully featured enough for the real computing enthusiasts," adds Kearney. "The system had to fit the needs of the staff, as well as benefiting clients. Maximizer Enterprise is very user-friendly."

A product to call your own

Boshoff Visser also preferred Maximizer Enterprise's buy option as opposed to having to rent its CRM package. It didn't want to enter into a long-term contract due to the fast-growing nature of the business and wanted the freedom of owning the software and being able to take whatever technology route it felt might be appropriate in the future. "We didn't want to be forced into a long term contract. It was important to us not to feel tied-in to anything," comments Kearney.

Maximum support

Based on its experience with Maximizer's South African business partner Camsoft, which helped it implement the system, the group also felt Maximizer would be able to support its future needs. "Camsoft, who presented and installed the product, have been great from day-one. "There were the inevitable teething issues during the learning curve experience, but they really helped us through this and the after sales service was excellent. Even though they are three hours' drive away but it doesn't matter because they provide great support over the phone."

Final verdict

"Maximizer Enterprise has enabled an overall and significant improvement in productivity," concludes Kearney. "We are confident stepping up to Maximizer Enterprise has improved productivity and customer care as well as sales point up selling."

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