

Case Study | Fortuna Power  
Systems

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# Fortuna Power Systems



Basingstoke-based Fortuna Power Systems is a data storage solutions supplier that designs, installs and maintains digital data storage solutions for customers ranging from banks, county councils, government ministries and telecommunications firms. While relatively small, the company, which has been operating for 12 years, boasts key clients such as Barclays Bank and the Ministry of Defence and last year turned over approximately £1.5 million.

## Biting the bullet

Until very recently the firm had no CRM system in place to help it manage and automate its customer data. But with growth comes increasing transactional complexity and the company realised it was time to bite the bullet on customer relationship management. *"We evaluated loads of different systems but Maximizer was easily the one that best suited our needs."* explains Fortuna Power Systems office manager Tina Hart. *"Interactive and intuitive, it is easy to use and clearly shows us the pipeline for sales opportunities and helps us obtain sales models."*

## Nice and easy

Having made the decision to go with the Maximizer solution, the company found that implementation couldn't have been simpler. The company worked closely with Maximizer business partner QIC Systems who helped them with customisation and implementation of the system. *"QIC Systems, ensured an absolutely trouble-free installation. It was so quick and efficient, and having experienced this type of thing before in previous companies I have worked for, believe me, there can often be enormous teething problems! QIC just made the whole process completely hassle-free."* The company also has the added comfort of knowing that they can work with QIC Systems should they require IT Support or need an answer to any queries. Further, should Fortuna opt to expand its usage of Maximizer in future, as with all the Maximizer business partners, it can rely on QIC Systems for upgrades and comprehensive on-site training in any new modules.

## Making it pay

The firm has only been using the system for a couple of weeks but it is already reaping the benefits. Out of the six employees using it, one is employing it as a customer service resource. *"It has enabled that person to stay abreast of returns and customer issues, which is vital for a company like ours,"* says Tina. As for the remaining users, from the sales team, the possibilities, says Tina, are enormous. *"Maximizer has enabled us to formalise and automate every stage of the sales process. We are giving quotes to customers on a daily basis, either by phone or by email. Now, we are in a position of being able to follow everything up in a systematic way - make sure the customer has all the information they need and be sure that we have done everything we possibly can to close that sale. We are quite a small company but now if someone is out of the office, someone else on the team can follow up in that person's absence. If an action needs taking it will be flagged up on the screen for everyone to see and the entire communication history between ourselves and the client is available to refer to. Prior to us installing Maximizer, if a key person was absent, things would fall through the cracks and we'd risk losing a sale."*

## Setting targets

The company also has much clearer targets, thanks to being able to properly visualise its opportunities. *"Within just two weeks of using Maximizer we were able to make projections for £1 million-worth of business that we'd quoted for,"* explains Tina. *"Prior to using Maximizer we simply wouldn't have had that precise information. Now we have a clear idea of who we're targeting, anticipated revenue and what we need to do to ensure we hit those targets."*

## Post-match analysis

Further, where a prospect doesn't convert into a sale, the company is able to look back at each history and find out exactly why. *"We can now see all the monthly figures - what we quoted for, what actions were taken, why we won what we won and, crucially, why we lost potential business. Having that history right at our fingertips creates massive insight and efficiencies."*

## Final verdict

*"Lots of CRM packages claim to be something they're not,"* concludes Tina, *"but Maximizer totally fulfils its potential."*

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