



## Maximizer Enterprise™

### DNA Group, Inc.

### DNA Group Creates Business

### Intelligence from Customer Data

*“Our sales team has a distinct advantage when our customer data can be turned into actionable insights that are accessible in real time.”*

**Brooke McKissic, DNA Group’s Senior IT Solutions Developer**

#### DNA Group, Inc.

**Industry:** Manufacturing

**Location:** Raleigh, North Carolina

**Web:** [www.dnagroup.com](http://www.dnagroup.com)

**Number of Licences:** 33;  
Maximizer Enterprise eCRM

#### Key Benefits

- ✓ Real-time customer information and reports available at the click of a button
- ✓ More accurate sales forecasts
- ✓ Increased efficiencies from sales staff
- ✓ Faster and more proactive customer service



#### Introduction

DNA Group, Inc. is the North American distributor for Defond Manufacturing Limited, Inc, a major supplier of switches and electronics to the appliance, marine, transportation, power tools, white goods, lawn & garden, and consumer electronics industries. DNA Group serves the global marketplace by emphasizing responsiveness and the ability to focus on the needs of each individual customer and project.

DNA Group’s mission is to deliver a competitive advantage to its customers through value-added service. In order to better understand its customers and improve the way its sales team works, the Company implemented a customer relationship management (CRM) solution from Maximizer Software. The implementation involved two distinct phases designed to improve and automate most sales processes and to provide users of the system with real-time customer information in a variety of management reports. DNA Group now has comprehensive customer information available with the click of a mouse and, as a result, each salesperson has reclaimed a few hours per week of valuable selling time.

#### Problem / Challenge

In 2001, DNA Group’s product line’s and customer base were experiencing rapid growth but their sales processes weren’t keeping up and were actually hindering the timely completion of projects and speed-to-market of new products, as well as creating customer satisfaction issues. In anticipation of rapid growth, and to offset the lack of sales automation, DNA Group chose to implement a fully functional replacement CRM solution for their on-site services and sales teams and offsite sales teams. This decision was driven by the following business requirements: increased expectations by customers for faster service; the ability for their sales team to remain competitive; and the need for real-time intelligence into critical customer issues.

#### The Maximizer Enterprise Solution

DNA Group knew they needed to take steps to modernize their communications and collaboration infrastructure and give their sales team the tools they needed to compete successfully. With an extensive set of requirements in place, DNA Group researched various options including SalesLogix. After a thorough investigation, however, Maximizer Software was chosen as the preferred CRM vendor since the solution closely matched DNA Group’s requirements: it is designed for rapid deployment and ease of use, and it could be easily customized for processing sales quotes and orders, and sharing reports and literature with existing clients. DNA Group also chose to work with Maximizer Software’s Professional Services team for additional support and services.

## Implementation

Maximizer Software's Professional Services team started the CRM implementation by migrating all of DNA Group's data out of a customized Microsoft Access application. Once completed, DNA Group easily configured various user-defined fields (UDFs) to more closely match the way their business worked, while the professional services team at Maximizer Software customized a data entry interface for quotes and orders that brought in data from external SQL tables and was also integrated with the sales opportunity manager.

The system - now configured and customized to work seamlessly with the Company's initial business process requirements - was finding favor with DNA Group's sales and services teams who were starting to leverage the information stored in their database and translating it into appropriate actions. It was at this point in 2002 that the Company made a decision to expand its strategic use of CRM by applying Maximizer Enterprise to generate real-time business intelligence.

According to Brooke McKissic, DNA Group's Senior IT Solutions Developer, real-time business intelligence would give the sales team the ability to know their customers intimately and enable them to be more proactive about building profitable long-term relationships. McKissic was confident DNA Group's sales team would have a distinct competitive advantage if all of the customer data that was being tracked could be turned into actionable insights that each customer-facing user could access in real time. Sales managers could also monitor staff behavior in order to drive change and provide training when required.

"The second phase of our CRM strategy involved turning our customer data into meaningful reports that would give us real-time information on new opportunities, sales pipelines, revenue status, and customer complaints," says McKissic. "As the sales agent for Defond Manufacturing, our main business is really customer service. And having our sales, complaint, and customer data at our fingertips in a meaningful format is what enables us to do our business better than any one else. This is precisely the kind of competitive advantage we hoped to create by implementing a CRM system throughout the organization."

DNA Group is now using Maximizer Enterprise to track all customer interactions and histories, including deals in progress, on-going projects, upcoming activities, return merchandise

authorization forms (RMAs), plus individual notes and documents. Line-of-business managers and sales and service staff at DNA Group can choose to view this information through hundreds of different Crystal Reports developed by McKissic to instantly gain the intelligence needed in areas such as sales forecasts, lead status, open complaints, and RMAs. External sales partners can now access this as well, bringing them into DNA Group's real-time information loop. And as CRM power users, DNA Group continues to work on improving their CRM processes by adding real-time alerts and dashboards in order to sustain the competitive advantage that instant access to information brings.

*"We're helping the sales team at DNA Group use the information stored in their database to make key decisions."*

**John Robb, Vice President, Customer Support & Services, Maximizer Software**

"With Maximizer Enterprise we are able to use our customized Crystal Reports to deliver specific insights to each department, including executives and managers, inside sales and our external sales partners, and even our engineering and product management teams. We have visibility into our lead and project status, marketing programs, complaints, employee performance, and the sales revenue stream. This is helping our employees build valued relationships with our customers. And the efficiencies and timesavings we're creating means additional resources can be allocated to other projects. This is increasing overall customer satisfaction," said McKissic.

"We're helping DNA Group close the gap between their data and the key decisions the sales team needs to make. DNA group can leverage the information stored within Maximizer Enterprise and translate it into the appropriate actions," said John Robb, Vice President, Customer Support & Services, Maximizer Software. "DNA Group is able to easily create sophisticated reports from their CRM system and, as a result, are generating measurable results. Our professional services team is making sure Maximizer Enterprise is meeting DNA Group's business requirements at a fraction of the cost of other CRM systems. Working with DNA Group has been a delight. They appreciate the power of the Maximizer Enterprise CRM solution and are always seeking out the next step in leveraging functionality to their strategic advantage. And since DNA Group is a company that never stands still, we are currently working with them to plan out their CRM strategy for the next several years. They decide what they can do in-house and let us know what assistance we can provide. It's an excellent vendor-customer teamwork relationship."

## Results

By selecting Maximizer Enterprise and Crystal Reports the DNA Group has chosen a proven and affordable CRM and business intelligence solution that allows the organization to share customer and opportunity information between the sales team and external sales channel partners on a real-time basis.

“Salespeople can access all of the customer information they need from just one place,” states McKissic. “Our managers can say with certainty which customers are most and least profitable for us; we can tell when sales are dropping or growing and in what region; and we can see which sales people are producing the most revenue or where they are in each sales cycle. Our external sales partners can also access this data, which is an easy way of bringing them into our real-time information loop.”

This instant access to customer records has dramatically reduced the amount of time it takes for DNA Group’s sales and customer services and support departments to accurately answer a customer inquiry. DNA Group now runs hundreds of reports each week and tracks dozens of metrics on a regular basis, including the expected revenue stream. Sales efficiency has increased among DNA Group’s 30 salespeople and, as a result, revenues have also increased.

In addition to sales reports, opportunity reports are generated as a way to monitor high priority projects in the sales funnel. By tracking the opportunity status, the sales team can better understand the needs of their prospects and monitor all of the new opportunities. Managers at DNA Group can also evaluate the effectiveness of marketing programs with metrics based on sales lead data to ensure all new leads are acted upon quickly.

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**Brooke McKissic, DNA Group’s Senior IT Solutions Developer**

## About Maximizer Enterprise

Maximizer Enterprise is a proven, affordable CRM solution that helps small and medium-sized businesses succeed with an integrated suite of software tools to attract prospects, win new customers, and increase repeat business. With the lowest Total Cost of Ownership in its class, Maximizer Enterprise is quickly deployed, simple to use, easy to administer and has the functionality businesses need to build successful, profitable customer relationships throughout sales, marketing and customer service & support.

## About Maximizer Software

Maximizer Software Inc. provides proven and affordable customer relationship management (CRM) and contact management solutions that help small and medium-sized businesses increase sales and win new customers, streamline marketing to attract new prospects, and enhance customer service & support to increase repeat business. Maximizer Software has helped over 7,000 Maximizer Enterprise™ customers and more than one million Maximizer™ users grow their businesses by building profitable customer relationships with award-winning solutions.

## Awards



## For more information:

Locate a Certified Maximizer Business Partner  
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