

# MAXIMIZER CRM LIVE

## *Intermediate Training Agenda*

### **HOW CAN I DESCRIBE MY CUSTOMERS?**

Learn to use User Defined Fields (UDFs)  
Create UDFs that work for you  
Assemble UDFs into useful Key Field Lists

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### **HOW DOES MOBILE ACCESS WORK?**

Set up Maximizer for your smart phone  
Access all your Maximizer information on the road  
Send Maximizer-based email to your customers

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### **HOW DO I USE MAX TO TRACK REPETITIVE TASKS?**

Create Action Plans for your sales processes  
Use Action Plans to manage upcoming events  
Use Action Plans to manage relationships

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### **HOW DO I MANAGE MY SALES PIPELINE?**

Set up processes and stages of Opportunities  
Support your Opportunities with Quotes and Campaigns  
Generate pipeline reports

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### **HOW DO I MANAGE CUSTOMER ISSUES?**

Create Customer Service cases from different places in Max  
Record and monitor your cases  
Look for patterns to improve your business processes

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### **HOW CAN I FINESSE MY USE OF MAXIMIZER?**

Use "Notifications" to stay on top of current activities  
Integrate with "QuickBooks" to track key purchasing data  
Use the App Directory to extend the utility of Maximizer