

Overview & Highlights

Empower staff with the tools to leverage sales, marketing and customer service information and build long-term customer relationships, win more deals, and accelerate your business growth.

Attract Prospects, Win New Customers, Increase Repeat Business.

For over 20 years, Maximizer™ CRM has been the software solution of choice for small to medium-sized businesses. With more than 120,000 customers and over one million licenses sold across a variety of industries, Maximizer CRM has helped companies like yours maximize revenue and deliver the level of customer satisfaction that earns repeat business.

Maximizer Software fuels your business success with simple, accessible, adaptable CRM that provides the best value in the market. Built to maximize business productivity, Maximizer CRM is richly featured and easy to deploy, use and maintain. It consolidates all contacts, action items, business communications, forecasts, reports and results into one central hub, making information widely accessible throughout your organization, yet precisely controlled to suit your requirements.

Maximizer CRM's All Access licensing delivers a complete up-to-date customer history to customer-facing teams — anytime, anywhere — with access through mobile smartphones, the Web, or your Windows desktop. Contributors across sales, marketing, and service can update and take action on the latest developments from sales deals and campaigns to service cases-in-progress, receiving at-a-glance insight that allows them to work smarter.

Gain business visibility across sales, marketing & customer service. Maximizer CRM delivers actionable business insight through executive dashboards, automated alerts, and reporting, allowing you to monitor team performance, sales status, and customer satisfaction. Empower executives and managers with an accurate view of your company's performance at every customer touch-point, so you can set your course and adjust tactics with confidence.

Maximizer Software and its certified partners work with you to understand and align Maximizer CRM with your business goals using proven best practices to meet your needs and ensure smooth deployment. The result? Your business will evolve to a new level through improved processes and efficiencies in sales, marketing and customer service.

SALES | MARKETING | CUSTOMER SERVICE & SUPPORT

“Having customer information available at our fingertips, whether it be through a laptop or a BlackBerry, provides our people with the information they need exactly when they need it.”

Faron G. Thompson, Managing Director,
Income Property Finance Division,
Primary Capital Advisors

Mobile CRM

Reduce sales downtime, increase customer face time, win more deals

Your customers today have greater expectations than ever for rapid response. People in your organization — field sales and service staff, mobile professionals, and executives — need the right information at all times to respond to these demands.

Mobile devices, including BlackBerry,[®] Apple[®] iPhone,[™] Windows Mobile,[®] and other popular smartphones have become critical tools to compete effectively. With Maximizer Mobile CRM, you and your staff can go beyond reading and reacting to email — and be proactive about managing your customers and winning more deals. Your laptop is not always convenient when you need to look-up the status of an account's last service call, review the latest proposal, or check notes from the last phone call with a prospect. Don't let this hinder your mobile staff from succeeding in the field.

Equipping your staff with mobile CRM software gives you the edge over your competitors with real-time access and updates to accounts, sales deals, service cases, and schedules while on the road. No more waiting for a laptop to boot up, or fumbling through account notes before an important sales call.

Empower your staff with Mobile CRM today to:

- Get the edge on your competitors and win more deals.
- Reduce staff downtime and increase field productivity with access to customer information at all times.
- Increase customer face time by reducing time spent on administration in the office.
- Build customer intimacy by reviewing up-to-date customer details before a meeting.
- Improve sales forecast accuracy with real-time updates from the field.
- Increase CRM data accuracy: an easy-to-use interface on a familiar mobile device increases the likelihood that sales reps will update customer information.

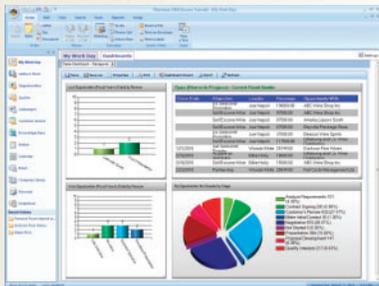
Maximizer Mobile CRM enables you to stay on top of your game with complete access to the critical customer and prospect information you need — anytime, anywhere.



Maximizer Mobile CRM: Supports BlackBerry,[®] Windows Mobile,[®] Apple[®] iPhone[™] and other popular smartphone devices.

“We have seen a 500% return on our investment with Maximizer CRM. We wouldn’t have been able to develop our global sales force without it.”

Cam Buschel, Sales Analyst
StemCell Technologies



Sales Management: Gain greater visibility into the success of your business with sales dashboards, opportunity monitoring, quota management, forecast and pipelines reports, activity logs and more.

Sales

Increase productivity and effectiveness to maximize your wins

Maintain sales momentum, track and measure individual and team performance and generate accurate forecasts.

Engage customers with a responsive, timely sales approach

Gain an edge over competitors and equip your team with the most impactful sales force automation solution that provides access to customer and sales information — when they need it, wherever they are.

- Update customer, lead and sales information through multiple access options — Window’s Desktop, through a web browser or on handheld devices (BlackBerry,® Windows Mobile,® Apple® iPhone,™ or other devices).
- Access popular programs directly from within Maximizer CRM, such as Microsoft® Outlook® for email, calendar and tasks, Word® for letters and quotes, and Excel® for importing data and exporting reports. Review customer activity, account status and financial history by integrating Intuit® QuickBooks® or Microsoft Dynamics™ GP.
- Document the entire history of each customer’s lifecycle — tracking conversations, transactions and incidents to help deliver greater value over time.

Measure performance and potential

With wizard-driven dashboards, managers begin each day with a visual health check on leads, opportunities, deals in progress, and sales quotas.

- Gain actionable insight by checking your personalized dashboard for a visual snapshot of sales leads, opportunities and account status.
- Stay updated on team, territory and individual performance, ensuring accountability and the required level of motivation within your sales organization.
- Keep tabs on your biggest deals by staying alerted to important changes in their status.
- Analyze opportunities and adjust strategy accordingly with instantaneous reports that deliver insight through sales pipeline funnels, lead summaries and forecast analysis.
- Customize your own reports with leading business intelligence tools including Crystal Reports® and Microsoft SRS, or utilize over 175 pre-formatted reports.
- Manage products, quotes and orders linked to sales opportunities to accurately track the entire sales and purchase cycle.

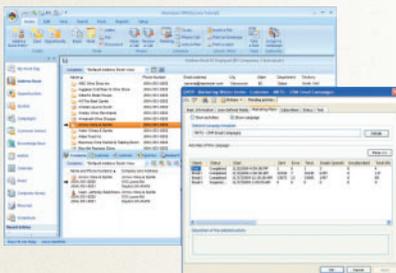
Optimize sales resources to make the most of talent and expertise

Increase close ratios by modeling best sales practices that guide salespeople through a proven process.

- Apply sophisticated, custom methodologies to better manage unique opportunities, or take advantage of simple Action Plans and built-in templates that keep straightforward deals moving ahead.
- Drive more sales through channel partners with Partner Relationship Management lead assignment and forecasting.
- Automatically assign leads and accounts based on territory rules ensuring that high-potential opportunities flow to the appropriate teams and reps.
- Track the progress of deals in the pipeline with territory reports.

“Maximizer CRM enables us to cost-effectively build, execute and track targeted direct mail and email marketing campaigns with different messages for different groups of clients and prospects. As a B2B company, we rely on this tool to help us reach audiences quickly with market relevant communications — ultimately cultivating strong relationships to grow our business.”

Elen Alexov, Director Marketing Services,
Ipsos Canada



Marketing Metrics: Quickly evaluate campaign ROI and lead status.

Marketing

Target precisely to maximize response & ROI

Thanks to the powerful, built-in campaign manager and email marketing engine, you can validate and execute more targeted, cost-effective campaigns. Spend marketing dollars wisely by measuring results and redirecting resources to initiatives that generate proven returns.

Fill the sales pipeline with targeted leads

Make the most of every outreach and ensure solid follow-up every time, by tightening up the tactics of your email-based marketing.

- Target customers and prospects quickly with relevant content using easy profiling and list management.
- Send and track HTML or text email, fax, and print campaigns.
- Comply with privacy, do-not-call and anti-spam legislation with out-of-the box, system-enforced safeguards.
- Set-up automated processes for lead management, such as automatically responding to web inquiries with a series of emails and alerting the appropriate sales representative to follow up. Collect data from web forms directly into Maximizer CRM, including any custom fields.

Identify what works by tracking campaign results

Automatically calculate campaign ROI — instantly see conversion rates, evaluate the cost of customer acquisition and interpret response rates to focus on what's working.

- Track the progression and outcome of opportunities by campaign to determine the link between targeted marketing and closed deals.
- View campaign response rates at-a-glance to identify which tactics are most successful.

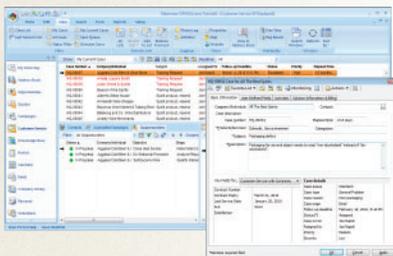
Improve marketing productivity

Effectively manage marketing resources to optimize time and budget on high-yield projects that contribute to the bottom line.

- Keep track of important campaign details and deadlines by assigning step-by-step action plans to team members.
- Share marketing collateral and documents across your organization to ensure consistent branding and communications.

“We have been using Maximizer CRM since v1.0 — we couldn’t have grown our business without it. With customer service & support functionality, we have improved service response times by 50%.”

Warren Mathusek
Mathusek Inc.



Customer Service Management: Track and resolve customer issues quickly.

Customer Service & Support

Resolve issues faster to maximize your customer satisfaction

Shape your customer’s experience by providing your service and support teams with the information and tools to interact and resolve issues quickly and efficiently. Satisfy customers by delivering exactly what they need, when they need it, helping them to become self-sufficient. Leverage new-found customer confidence to cross-sell, up-sell and promote repeat business.

Navigate service issues to rapid resolution

With timely access to product and customer information, service representatives deliver greater value on every call.

- Track, escalate and resolve customer service issues received through any incoming channel (phone, email or web) to ensure follow-through on every interaction.
- Resolve issues faster with a central repository of critical customer case details and a knowledge base of common incident resolutions.
- Make the best use of specialized knowledge by assigning and escalating cases based on expertise.

Manage resource allocation to ensure your team’s profitability

Give service reps access to the big-picture view of where to focus their efforts for success and the tools they need to be more efficient on every interaction.

- Get clarity on interaction volume and assign staff to match demand on products, service lines or channels.
- Reduce workload and increase customer satisfaction by giving customers and partners self-service access to case status and FAQs through the web.
- Ensure service agreements are renewed on a timely basis by tracking contract expiration dates.

Measure and improve service quality

Automate internal processes to prompt reps at every step and track team performance.

- Deliver timely service by automatically notifying reps of new case assignments and overdue cases.
- Analyze case queues to ensure customer satisfaction and retention remains high.
- Gain a clear view of your overall service record with real-time access to critical customer service metrics through the dashboard.
- Identify opportunities for improvement with customer service, product enhancements, and other critical customer feedback points.

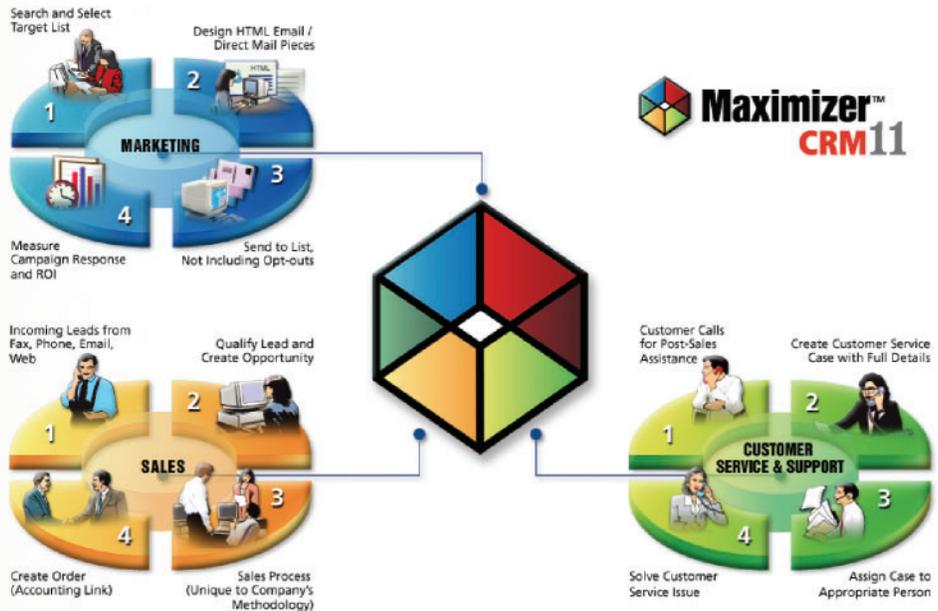
Maximizer CRM 11 Features

- Account and contact management
- Time management
- Task management and automation
- Sales force automation
- Sales forecasting
- Marketing automation
- Email marketing
- Customer service management
- Microsoft Office integration
- Outlook & Exchange synchronization
- Accounting integration
- Business Intelligence
- Workflow automation
- Partner relationship management
- Access options: mobile devices, web, Windows desktop, remote synchronization

Technology Partners



Certified Solution Provider



Contact Maximizer Software to learn how you can mobilize your workforce with Maximizer CRM 11 All Access.

i. Maximizer CRM includes report templates in Crystal Reports and Microsoft SQL Reporting Services formats. Maximizer CRM also supports customization of reports through Crystal Reports; an add-on product with additional license fees.

Why Maximizer CRM 11?

1. **Simple & quick** to deploy, learn, use and maintain
2. **Access options** through the Web, desktop and mobile smartphones
3. **Value.** Best value for a full-featured CRM, low total cost of ownership.
4. **Expertise.** More than 20 years as a pioneer and leader in CRM.

Visit www.maximizer.com for:

- Information based on your role: sales, marketing, service, executive, IT
- Information on CRM and Contact Management
- An overview of features and technology
- Online demos and free trial software
- White papers and webinars on CRM best practices.

Maximizer CRM helps small and medium-sized businesses maximize sales, customer satisfaction and profitability through increased business productivity and optimization of limited resources.

Maximizer Software
Simply Successful CRM

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