



Maximizer CRM Overview



www.max.co.uk
www.maximizer.eu
www.maximizercrmcentral.com

About Maximizer

Maximizer CRM 12

Features:

- Account and contact management
- Task management and automation
- Sales Force Automation
- Sales forecasting
- Marketing automation
- Email marketing
- Customer service management
- Business Intelligence
- Microsoft® Office® integration
- Outlook® & Exchange® synchronisation
- Workflow automation
- Partner relationship management
- Time management
- Accounting integration & eBusiness
- Deployment: Cloud and On-premise
- Access options: Windows desktop, Internet Browser, remote synchronisation & Mobile devices such as smartphones and tablets (e.g. iPad®)

Good customer relationships are at the heart of business success. As a pioneer in the Customer Relationship Management (CRM) industry for 25 years, Maximizer has been helping businesses increase sales, generate high quality leads and raise productivity and revenues whilst delighting customers.

However, to be successful in today's difficult climate, organisations need to be agile; having the ability to adapt quickly to changing requirements in a cost-effective and productive way.

The latest generation of Maximizer CRM software has the ability to deliver these benefits right across your organisation.

A global organisation, Maximizer has been the SAVVY choice for CRM for more than 120,000 customers of every organisational size and in every industry across the world. With over 1,000,000 licences sold, the value from Maximizers' simple, accessible and affordable systems are tested and proven.

Available in the Cloud or On-premise, Maximizer CRM12 provides the flexibility to access your critical corporate and customer information when and where you need it - whether it is from your desk, online or on the move via mobile devices like smartphones and tablets (e.g. iPad®). This lets Management, Sales, Marketing and Customer Service staff have rapid, reliable insight and make quick, informed decisions in real time, helping reduce costs, increase sales and improve customer retention.

Quick to deploy, learn and use, Maximizer CRM 12 delivers a complete and robust solution, centralising data whilst streamlining business processes. Harnessing this power allows you to rapidly optimise your level of productivity, performance and profitability.



Maximizer CRM - for 25 years the savvy choice of successful businesses



Maximizer CRM: helping you build profitable relationships and transform your sales.

“Through Maximizer CRM, the team is able to target end users at the relevant time, increasing sales revenue and driving organic growth.”

Richard Harris,
Managing Director,
Lely Ireland



Real time Business Intelligence:
Reports and dashboards available via
iPad and other mobile devices

Sales

Attract. Engage. Succeed. ...anywhere, anytime

Gain sales insight quickly and simply with a complete history of customers, prospects and leads from just one place – through multiple access options: Windows Desktop, a web browser or on mobile devices (Apple® iPhone®, BlackBerry®, Windows Mobile®, or tablets such as the iPad®).

- Increase your win ratio by implementing proven, repeatable best practice sales processes for step-by-step success.
- Document and review the entire history of customer activity, account status and financial history to help deliver greater value over time.
- Gain actionable insight and adjust strategy accordingly by checking your personalised dashboards for a visual health check of sales leads, opportunities, sales pipeline funnels, sales quotas and account status.
- Manage products, quotes and orders. Link sales opportunities to accurately track the entire sales and purchase cycle.
- Keep tabs on your biggest deals by staying alerted to important changes in their status.
- Enable sales teams to easily work together more effectively, manage accounts and collaborate on opportunities.
- Forecast with confidence using report suites that include sales pipeline, lead summary and opportunity analysis.
- Work seamlessly with Microsoft® Outlook®, Word® and Excel®, now with links to SharePoint® Documents . Integrate with Accounting packages and other internal systems such as Asset tracking or ERP software.
- Measure performance and potential - get real time visibility into sales and team performance with out-of-the-box and custom reports.
- 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.
- Sales Quota Management: view of sales targets and individual and team performance.

Business Intelligence

Interpret crucial metrics, turning data into information, into knowledge.

Make better decisions, faster with real time key performance metrics and reports delivering better understanding and insight into your customers and your business.

- Simple dashboard wizards in Maximizer CRM 12 allow you to get a big-picture perspective, or a very detailed view by easily creating and personalising dashboards to display the metrics most relevant to you, your staff and any other relevant personnel given permission.
- Share key metrics, save time and improve visibility across the organisation with the ability to email dashboards.
- Over 175 standard Customer reports installed with Maximizer, plus save money and time by utilising built-in SQL Server Reporting Services (SSRS).



Execute effective marketing:
Run professional email campaigns targeted at customers and prospects.

“We found Maximizer refreshing and very easy to use; the office team got to grips with the system very, very quickly”

Andrew Wise,
Director,
Thames Valley Asset Finance

Marketing

Create, attract, retain and delight customers, profitably.

Maximizer’s built-in marketing tools mean you can simply and effectively plan, budget, execute, analyse and optimise all aspects of marketing, ensuring you spend your marketing budget wisely and directing resources to initiatives that generate proven returns.

- Create, automate and track effective marketing for personalised, relevant campaigns and messages - HTML or text; email, fax, and print campaigns.
- Measure clicks, responses, leads, deals, ROI and revenue.
- Full campaigns or quick campaigns.
- Real time data for quick and informed decisions.
- Import leads directly from your website.
- Seamless integration of the Marketing and Sales functions in Maximizer delivers higher conversion rates and greater customer satisfaction.
- Simple to use, easy to customise and access - anywhere, anytime and anyhow, to work the way you do.

Improve marketing productivity and identify what works.

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

- Set-up automated processes for lead management, such as automatically responding to web enquiries 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.
- View campaign response rates at-a-glance to identify which tactics are most successful.
- Comply with privacy, do-not-call and anti-spam legislation with out-of-the box, system enforced safeguards.
- Keep track of important campaign details and deadlines by assigning step-by-step action plans to team members.

Customer Service & Support

Resolve issues faster to maximise your customer satisfaction.

Shape your customers 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.

- Automate processes, such as case assignment and notification, to keep you ahead of customer expectations.
- Track customer service issues and assign appropriate resources.
- Manage the delivery of resources more effectively to drive productivity.
- Enable customer self-service via secure Web portals.
- Access real-time sales and marketing information to support cross-sell and up-sell initiatives.
- Link to a central Knowledge Base to resolve issues faster.
- Escalate customer service issues to the appropriate specialist and resolve cases more rapidly.
- Control service resources through effective tracking of billable hours and rates according to service level agreements.
- Deliver personalised communications to customers throughout the sales cycle.

"Maximizer does not have the limitations I know other software packages have. The program is also very flexible because you can add and change parts... We cannot live without this anymore"

Gerwin Eersen
Managing Director
Gflex, Netherlands



Versatility and flexibility to access CRM when you need it, where you need it and how you want it.

Anytime, Anywhere, Anyhow

Access Maximizer CRM On Desk - Online - On the move

A pioneer in Mobile CRM since 1995, the latest generation of Maximizer CRM software provides cross device, cross function, multi-platform access through Windows desktop, the Web or mobile device (BlackBerry®, iPhone®, Windows® Mobile, Android™).

Mobile access also makes Maximizer available via iPad® and other tablets, so you can now view, read, modify and add all the information you would expect from a full CRM. An intuitive, easy to use touch screen, optimised for faster user adoption, removes the need to purchase different applications based on the mobile device and helps increase adoption and decrease inaccurate data.

This choice and flexibility of access options delivers the critical customer insight you need, when you need it, how you need it and where you need it - at your desk, at home or in the field.

Adapting to the way you work, this access versatility means organisations can deliver the quick, relevant and personal response demanded by customers and rapidly adapt to requirements in a productive and cost effective way.

- **Maximizer CRM for your Desktop:** The intuitive interface means Maximizer Windows desktop is fast and easy to learn, especially for those familiar with the Microsoft Office® suite of products.
- **Maximizer CRM Online:** Log in anywhere, using a secure, standard web browser, to your Maximizer system located On-premise or in the Cloud. Maximizer Web Access presents the same user friendly interface and great functionality as the desktop software.
- **MaxMobile – Mobile CRM:** Offsite regularly, occasionally or just away from your desk? Mobile CRM gives you the ability to manage all aspects of your CRM via your smartphone and mobile devices, providing you with the key to success in today's competitive environment.
- **Collaboration:** Allow teams to work together effectively by sharing information and documents through a Microsoft SharePoint® portal.

Social Networking

Build dynamic social profiles of customers and prospects by linking directly to relevant social networks and contacts' LinkedIn® profiles.

LinkedIn® Integration

- Prospect and generate new leads with the ability to search, view and link directly to a contact's or company's LinkedIn® profile from Maximizer.
- Enhance the level of customer engagement with access to a contact's LinkedIn® profile and shared connections within a company.
- Determine key contacts within a company to focus in on those with the greatest influence in the purchasing decision.
- Improve customer service and build customer loyalty with an additional channel of communication.

Social Profile Building

- Build complete customer and prospect profiles by capturing links to all relevant social networks in one place.
- Obtain up-to-date information on your contacts with direct links to external websites and social media profiles e.g. blogs, Twitter®, Facebook®, LinkedIn®.

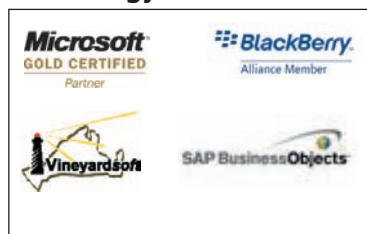
Compare Maximizer CRM Editions

		Maximizer CRM Editions			
USER FEATURES		Enterprise Edition	Group Edition	Entrepreneur Edition	
General	Who it's for	Advanced CRM for medium-sized businesses	Full-featured CRM for small businesses	Contact Manager for entrepreneurs & small businesses	
	Minimum # of Users	1	1	1	
	Maximum # of Users	Unlimited	10	5	
	Software Assurance ¹	Included	Included	Included	
Access Options	Mobile CRM for smartphones (including iPhone®, Google Android®, and BlackBerry®) and tablets (including iPad)	Mobile Access	Mobile Access		
	MaxMobile CRM for BlackBerry®	✓	✓	✓ ²	
	Web Access (including Firefox Support)	✓	✓		
	Windows Desktop Access	✓	✓	✓	
	Remote Synchronisation	✓	Add-on		
Sales	Sales Force Automation	Advanced ³	Standard	Basic	
	Sales Executive Dashboard	✓	✓		
	Sales funnel reports	✓	✓	✓	
	Lead Summary reports	✓	✓		
	Opportunity management	Team and Individual	Team and Individual	Basic	
	Opportunity monitoring (alerts)	✓	✓		
	Sales Quota Management	✓			
	Sales Action Plan (project management)	✓	✓	✓	
	Email templates with merge fields	✓	✓	✓	
	Territory management	✓			
	Real-time alerts (out-of-the-box) include lead status alerts, changed forecast, and won/lost deals*	✓	✓		
	Account management	✓	✓	✓	
	Interactive organisational charts	✓	✓	✓	
	Quote management	✓	✓		
	Partner Relationship Management	Add-on	Add-on		
	Lead management and routing	✓	✓		
	Sales forecasting	✓	✓	✓	
	Sales process methodology	✓	✓		
	Marketing	Marketing Automation	✓	✓	
		Email campaign respondent lists	✓	✓	
Campaign ROI calculator		✓	✓		
Lead Summary reports		✓	✓		
Marketing Action Plans (project management)		✓	✓		
Automatic campaign subscriber removal*		✓	✓		
Real-time alerts (out-of-the-box) include lead status alerts, suspended & late campaigns.*		✓	✓		
Automated email campaigns		✓	✓		
Automated fax and print campaigns		✓			
Campaign management		✓	✓		
Do-not-solicit enforced by system		✓	✓		
Email monitoring and automatic replies *		✓	✓		
Campaign failure alerts		✓	✓		
Web lead capture		✓	✓		
Customer segmenting with user fields	✓	✓	✓		
List management	✓	✓	✓		

		Maximizer CRM Editions		
USER FEATURES		Enterprise Edition	Group Edition	Entrepreneur Edition
Customer Service & Support	Customer Service	Advanced ⁴	Standard	
	Customer Service Executive Dashboard	✓	✓	
	Overdue case, case billing, other reports	✓	✓	
	Case creation based on incoming email	✓	✓	
	Case management (routing, queuing)	✓	✓	
	Case resolution	✓	✓	
	Knowledge Base	✓	✓	
	Real-time alerts (out-of-the-box) include case overload, overdue cases, and status changes *	✓	✓	
	Email monitoring and automatic replies*	✓	✓	
	Service billing	✓	✓	
Customer self-service portal	Add-on	Add-on		
Business Productivity	Customer & Prospect Action Plans	✓	✓	✓
	My Work Day (customisable home page)	Advanced	Advanced	Standard
	Email, tasks and calendar integration with Outlook®	✓	✓	✓
	Email, tasks and calendar integration with Exchange Server	Add-on	Add-on	
	Email templates with merge fields	✓	✓	✓
	Maximizer toolbar in Outlook®	✓	✓	✓
	Import/export in standard formats	✓	✓	✓
	Support for HTML email	✓	✓	✓
	Industry Packs for High-Tech, Legal, Financial, Real Estate	✓	✓	✓
	Key user-defined custom fields	✓	✓	✓
	Categorised and multi-level user-defined fields	✓	✓	✓
	Mandatory fields	✓	✓	✓
	Database searching with multiple criteria	✓	✓	✓
	Duplicate record checking	✓	✓	✓
	Calendar with product/category tracking	✓	✓	✓
	Calendar for multi-user collaboration	✓	✓	✓
	Calendar with resource & location management	✓	✓	✓
	CTI (Computer Telephony integration)	✓	✓	✓
	Task management	✓	✓	✓
	Account notes	✓	✓	✓
Account documents	✓	✓	✓	
Company-wide document sharing	✓	✓	✓	
Letters, faxes with merge fields	✓	✓	✓	
User configuration of views	✓	✓	✓	
Business Intelligence	Dashboards	✓	✓	
	Reports: Crystal	✓	✓	✓
	Reports: SQL	✓	✓	
	Reports: Web	✓	✓	
	Partner Web Access	Add-on	Add-on	
	Customer Web Access	Add-on	Add-on	
Workflow	Workflow Automation	Add-on (Lite included)	Add-on	Add-on
	Business activity monitoring & alerting *	Add-on	Add-on	
	Out-of-the-box queries and events to monitor business ⁵	Advanced Event Pak	Standard Event Pak	
	Business process automation*	Add-on	Add-on	
	Automatic report distribution*	Add-on	Add-on	
Email monitoring and response*	Add-on	Add-on		

		Maximizer CRM Editions		
USER FEATURES		Enterprise Edition	Group Edition	Entrepreneur Edition
Architecture, Security & Administration	User Interface customisation tool	✓	✓	
	Customisation Suite	✓	Add-on	
	Integration with Accounting API	Add-on	Add-on	
	Full & Read-Only access settings	✓	✓	✓
	Field-level security	✓	✓	✓
	Role-based security groups	✓	✓	✓
	Support for Microsoft® SMS for installation	✓	✓	✓
	Administrator-controlled Live Update	✓	✓	
	128-bit cipher public key encryption	✓	✓	
	Administration reports	✓	✓	✓
	Record global editing	✓	✓	✓
	Windows Authentication Only for SQL Server	✓		
	Single Sign-On for Windows Desktop Access	✓	✓	
	Single Sign-on for Web Access	✓		
Database	SQL Server	SQL Express	SQL Express	
Microsoft® Technology Support & Integration	Works with Exchange Server	Add-on	Add-on	
	Works with Outlook®	✓	✓	✓
	Works with Excel®	✓	✓	✓
	Works with Word®	✓	✓	✓
	Works with FrontPage®	✓	✓	
	Works with SharePoint® 6	✓	✓	
	Web Access with Internet Explorer®	✓	✓	
	Support for SMS for installation	✓	✓	✓
	Built for .NET framework	✓	✓	✓
	Integrates with Google® and Bing™ Maps	✓	✓	✓
Support for SQL Server	✓	SQL Express	SQL Express	

Technology Partners



1 Software Assurance included for one full year. Renewal fee after one year at 20% of licence MSRP.

2 MaxMobile CRM for BlackBerry® is an add-on product for Entrepreneur Edition with additional license fees. MaxMobile CRM for BlackBerry® requires wireless and server hardware and Microsoft® Internet Information Server (IIS)

3 Advanced Sales Force Automation features include Territory Management and advanced Workflow events.

4 Advanced Customer Service & Support Management module includes advanced Workflow events.

5 Advanced Event Pak includes 116 Queries and 78 Events based on features in Enterprise Edition; Standard Event Pak includes 69 Queries and 29 Events based on features in Group Edition.

6 Requires Customisation Suite - available for Maximizer CRM Group and Enterprise editions. For Enterprise edition Customisation Suite is included in the user price, for Group edition additional license fees apply.

* Requires Workflow Automation powered by KnowledgeSync. Additional license fees apply.

Certified Solution Provider



Why Maximizer CRM 12?

The SAVVY choice

1. **Simple & Quick** to deploy, learn, use and maintain
2. **Access Options** through web, desktop and mobile smartphones
3. **Value.** Best Value for a full-featured CRM, low total cost of ownership
4. **Vision.** 25 years of expertise driving development
5. **Your Choice.** Deployment in the Cloud, Partner Hosted or On-premise.

Visit www.max.co.uk 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 test drive of software
- White papers and webinars on CRM best practices

Maximizer Software
Simply Successful CRM™

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