MAXIMIZER FOR FINANCIAL ADVISORS

Intermediate Training Agenda

HOW CAN I DESCRIBE MY CLIENTS?

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

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 Clients

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

HOW DO I MANAGE MY SALES PIPELINE?

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

HOW DO I MANAGE CLIENT ISSUES?

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

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