Workflow Automation

Build a competitive advantage with automated processes and increased business visibility

While the competition struggles with manual processes, queries and reports on customer interactions, gain a competitive advantage by automating your critical business processes.

Action Plans and Workflow Automation, powered by KnowledgeSync[1], work together to streamline processes and reduce manual work for your frontline staff.

View and handle critical business issues promptly and effectively

Alerts and Dashboards

With automatically triggered, action-oriented alerts sent to your staff via email, task or phone, they can respond to time-sensitive milestones or required actions when customers demand. Alerts also keep managers on top of team performance by notifying them of specified exceptions and activities. Making informed business decisions requires accurate data and reporting to provide the necessary insight into your organisation.

In addition, Alert Dashboards show critical areas of your business that require attention, you'll have the confidence and agility to respond to your ever-changing business environment as events unfold. Providing visibility into different segments of your business information — such as your sales pipeline, new leads and high priority service cases - Alert Dashboards are easily configured for quick and easy setup and provide drill-down capabilities to view further details on metrics and dynamic updates for a real-time view of your business conditions.

Personalised view of metrics for an instant snapshot of your business

Wizard-Driven Dashboards

- Set up and modify dashboards easily
- Configure your own dashboards to display key performance indicators in formats of your choice and set up to update as often as needed
- Enhance your insight further by drilling down to view the data behind the metrics analysis and sharing of reports in a familiar environment.

Immediate view of key performance indicators

Formula User-Defined Fields

- Rapidly analyse performance based on metrics automatically derived from existing information contained in user-defined fields
- Save valuable time spent running reports and set up commonly-used formulas that pull information from other user-defined fields, to produce the specific metrics you need to see

Key Benefits

- Automate repeatable step-by-step processes and improve productivity
- Identify tasks that require immediate or overdue attention
- Improve efficiency and consistency with basic task automation
- Provide everyone with the up-to-date notifications necessary to work smarter.

- Use arithmetic, text and date/time and logic functions to obtain more in-depth profile on contacts, opportunities service cases and marketing campaigns
- Quickly analyse critical information such as financial values and potential sales opportunities.

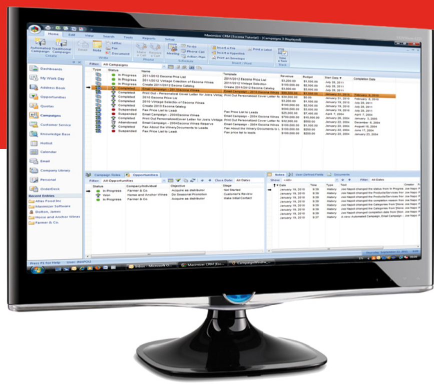
Ensure your top deals close and that customers are satisfied

Sales Opportunity Monitoring

- Effectively manage your sales pipeline and increase your close ratio by staying informed
- Keep tabs on your biggest deals and most valued customers by staying alerted to important thresholds and changes in their status

1. Workflow Automation, powered by KnowledgeSync, is an add-on product with additional license fees.

Effectively manage and trigger next steps seamlessly to increase win rates and overall efficiency.



- Determine what changes and thresholds you need to be aware of and configure email notifications to be sent to you and other stakeholders when a sales opportunity has been modified
- Facilitate timely responses and collaboration by keeping account managers and partners up-to-date so they can take effective action.

Keep projects and processes on track to meet deliverables

Action Plans

Use Action Plans to schedule and route tasks to the right people based on milestone events, prompting timely action or response to customers and prospects. Flexible and easy to configure for business users, create Action Plan templates that assign everyday tasks in order to guides sales processes, marketing projects or services incidents. Implement best practices in your systems and have frontline staff follow the same step-by-step activities to uphold consistency and increase your chances for success.

Automate repetitive and manual tasks for significant efficiencies

Workflow Automation powered by KnowledgeSync

Workflow Automation works as an engine in the background, ensuring that critical tasks, such as assigning web leads, sending automated email communications, or notifying staff of service escalations, are triggered and executed automatically. This allows the relationship building and ongoing communication process to be seamless, empowering you to respond more rapidly, consistently and reliably to customer enquires.

With over 90 pre-configured queries and 50 events (actions), Workflow Automation helps you automate processes in sales, marketing and customer service as well as those from other systems, such as accounting or inventory systems, to streamline activities automatically — without manual labour requirements.

Easy setup process

Event Manager Navigator

The visual flow charts of Event Manager Navigator make the creation of alerts and processes easier and more intuitive. Navigate from one central interface to quickly view, add or modify Workflow events without having to decipher or perform complex programming.

To make it even easier you can select from Maximizer CRM's broad range of pre-configured queries and events to monitor your business and automate processes for increased efficiencies and insight.

Lead management

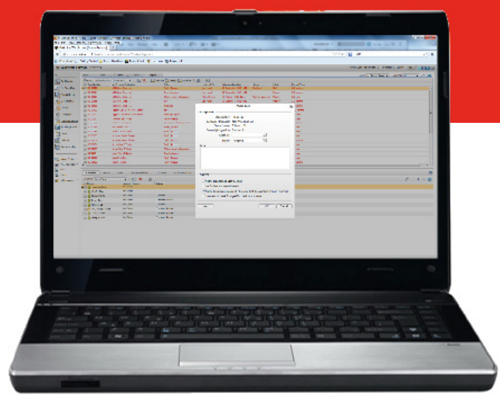
Notify sales or account managers when the following processes are overlooked:

- Lead not assigned
- Lead not contacted after X days
- Lead with no follow-up task created
- Lead with no status update after X days
- Hot lead with no associated sales opportunity
- Sales Representative has created fewer or more than X leads in Y days.

Account and sales opportunity management

Alert sales or account managers when the following updates occur with sales opportunities.

- Account is not assigned to a territory or account manager
- Sales opportunity is updated with Lost/ Abandoned/Suspended with no “Reason”
- Actual revenue of closed deal is < 50% of forecast; or > 125% of forecast
- More than X sales opportunities in progress with one prospect or customer
- More than X lost or abandoned by any rep within Y days
- Due to close this week, probability > 75%
- Forecast revenue or probability of closing is changed
- Opportunities won, lost, suspended,



Provide a seamless customer experience by automating the case resolution process.

or due to close today

- More than 14 days overdue for closing
- Sales opportunities open for more than 90 days.

Quote and order management

Monitor quotes being generated and sent to prospects, and the orders being booked, by sending notifications of the following actions to management.

- Quotes over £X created, updated as inactive, or expiring in X days
- Account Manager with fewer or more than X quotes in the last Y days
- Orders over £X booked
- When more than or less than £X worth of orders is created in the last Y days
- Orders older than Y days not yet shipped
- Orders over £X cancelled.

Customer service case management

Alert the customer service manager or service staff member when the following incidents occur related to customer service cases.

- 10 or more open cases per assigned staff person
- Case priority or status is changed
- Case resolved, or not resolved today
- Follow-up date is today or tomorrow
- More than X open customer service cases with priority "high"
- More than X unassigned customer service cases
- Customer service case open for more than a week
- Automate case creation based on incoming email.

Marketing campaign management

Notify the marketing manager when the following updates occur with marketing campaigns.

- Notify the marketing manager when the following updates occur with marketing campaigns.
- Campaigns with more or fewer than X sales opportunities associated with it in the last Y days
- Campaigns with more or less than £X worth of sales opportunities associated with it in the last Y days
- Marketing budget is changed
- Completing this month
- Forecast revenue is changed
- Actual revenue is < 65%
- Campaign Activity is suspended.

Automate list management to ensure compliance with anti-spam legislation and clean lists for your next targeted marketing campaign.

- Remove bounced emails from campaigns
- Remove "unsubscribe" requests from email campaigns

Staff/performance management

Ensure consistent data is entered into Maximizer CRM, and that staff are following process guidelines.

- Receive exception reports on anything you want to monitor with your data and customer interactions, such as notifications when employees enter inconsistent data (missing contact information, unauthorised discounts)
- Send reminders to remote staff who haven't synchronised with the main system for X days
- Be notified when there are more than X overdue tasks, or overdue for more than Y days for any staff person.

Knowledge Base[2]

Monitor the articles that are being distributed through the Knowledge Base with notifications if the following actions occur.

- Draft Knowledge Base article created
- Knowledge Base article older than X days with status of "Draft"
- Knowledge Base article published
- Knowledge Base article expired
- Draft Knowledge Base article used as resolution to a customer service case.

2. Knowledge Base is included with Maximizer CRM Enterprise Edition and is available as an add-on product with Maximizer CRM Group Edition

Automate triggers when reports and dasboards reach milestones to keep response times rapid and relevant staff alerted.

Business intelligence

- Generate and distribute reports automatically. For example, schedule sales forecast reports to senior executives every Monday morning
- Generate and distribute reports when a certain action within Maximizer CRM or other application occurs. For example, if an account manager abandons or loses more than five opportunities in one week, send a sales territory forecast and phone log activity report to the sales manager.

Workflow Automation features and formats

		Corporate	Basic	Lite
Workflow Features	Maximizer CRM 12 Availability	Add-On	Add-On	Included with Enterprise Edition Add-on for other Editions
	Email Response System to Monitor Inbound Email	✔		
	Event Pak with Queries & Events for your Edition of Maximizer CRM	✔	✔	✔
	# Active Events	Unlimited	Unlimited	6
	Complex Queries*	✔	✔	✔
Response Formats	Email text alerts	✔	✔	✔
	Email HTML alerts	✔	✔	
	Pager Alert	✔	✔	
	Fax (includes fax driver)	✔	✔	
	FTP (post files)	✔	✔	
	Crystal Reports	✔	✔	
	Run other programs (integrate with back-office applications)	✔	✔	✔
	ODBC triggers (integrate with back-office applications	✔	✔	✔
	VBScript (advanced integration with back-office)	✔	✔	

* Complex Queries is the ability to configure an event to use multiple queries, the ability to make one event dependent on one or more other events; the ability to have one event "call" one or more other events; or the ability to trigger an event based on a change made to a database field.

About Maximizer Software

Maximizer Software delivers Customer Relationship Management (CRM) software and professional services to meet the needs, budgets and access requirements of entrepreneurs, small and medium businesses and divisions of large enterprises.

Simple, easy to use and affordable, Maximizer CRM enables companies to mobilise their workforces through all-access web, smart phone, tablet and desktop delivery methods.
Easily configurable for organisations in any industry, Maximizer CRM optimises sales processes, enhances marketing initiatives and improves customer service to ultimately boost productivity and revenue.

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Maximizer CRM

Maximizer CRM helps small and medium-sized businesses maximize their marketing, sales, customer satisfaction capabilities and enhance their productivity and efficiency through the optimisation of what resources they have.

Why Maximizer CRM?

- Simple & quick to deploy, use and maintain
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- Value for money with low total cost of ownership and monthly subscription models
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