

# Sales Force Automation

Maximizer CRM helps sales managers, teams and individual contributors to collaborate, accessing and sharing information across Sales, Marketing and Customer Service & Support.

- Gain real visibility into sales performance to guide your team
- Maximize sales productivity with the tools you need to move deals forward anytime, anywhere
- Implement proven, repeatable sales processes for step-by-step success
- Leverage existing technologies for mobile, web and desktop access and continuity with Microsoft Office and Outlook integration



**Lead alerts:** Ensure timely follow-up on leads by setting up automatic reminders, triggered after a specified time period.

## Increase productivity and sales effectiveness to optimize opportunities and drive revenue.

From quote to close, sales executives and frontline sales professionals face the challenge of higher customer and prospect demands, greater competition and economic uncertainties. Gain a competitive advantage over your competitors and equip your team with an impactful sales force automation solution that provides unparalleled access to critical customer information and performance insight — when you need it, and as you want it — at your desk, from home, or while on the road. Optimize sales performance, build your sales pipeline, improve forecast accuracy, and empower your staff to develop the customer relationships that ensure sales success. Maximizer CRM is the one-stop CRM solution that lets you stay focused on the revenue generating activities and opportunities that will drive your business forward.

## Gain real-time insight into your sales pipeline and performance

### Business Intelligence with Dashboards and Reports

Stay on top of productivity and sales levels with real-time visual snapshots of company and team performance. Maximizer CRM's easily configured dashboards and customizable reports provide you with real-time feedback to adjust tactics or resources on-the-fly. Maximize your wins by forecasting accurately, following deal progress and driving your team to move opportunities through the sales pipeline. Forecast effortlessly and take proactive measures to ensure your sales team hits revenue targets.

- Gain actionable insight by starting each day checking your management dashboard for a visual health check on sales leads, opportunities, service cases and account status.
- Set up wizard-driven dashboards, formatted with your choice of indicator style, displaying the key performance indicators (KPIs) that matter to you, for a personalized view of metrics at a glance.
- Enhance your insight further by clicking on the dashboard indicator to drill down to view the details behind the metrics.
- Easily recognize trends and performance patterns by monitoring KPIs such as the status and value of leads, opportunities and forecasts, then drill down to view further details.
- Leverage detailed reports to gain further clarity as to which tactics work most effectively.

“For the money, I can’t imagine a better solution than Maximizer CRM that could have better supported our business through the growth we’ve experienced — including a growth in assets under management by an average of more than 30% per year while retaining 99% of our clients.”

Kevin J. Timmerman, President,  
Steele Capital Management

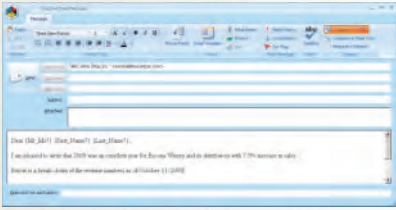
- Spend more time selling and less time on the mechanics and administration of generating reports with out-of-the-box tracking of customers, leads, opportunities, and more in over 175 standard reports.
- Export any report or view of sales and customer information to Excel® for further analysis and sharing of reports in a familiar environment.
- Personalize each rep’s workspace to show the day’s priority tasks, appointments and progress on their own sales targets.
- Get at-a-glance updates without needing to open Maximizer CRM, using Maximizer Vista Gadget KPIs on your desktop.
- Automatically trigger reports with Sales Opportunity Monitoring, emailed to you, or your team members, based on a critical thresholds of activity or inactivity on leads, or change of status to opportunities.
- Monitor productivity and individual performance through the collaborative business calendar, phone logs and notes that track and time activity by product and category.

## **Build customer relationships for long-term success**

### **Account & Contact Management**

Profitable customer relationships are essential to building your business. You need to effectively manage these relationships — from prospect, to close, to lifetime customer — in order to stand out from the competition. Maximizer CRM enables you to provide customers with added value and an exceptional experience through rapid response, ongoing engagement and knowledge of their entire history with you. With every customer and prospect’s profile and interaction history tracked in detail in Maximizer CRM — including quotes, orders, project details, emails and calls — you and your staff are equipped with the necessary information for engaging customers, earning loyalty and driving repeat business.

- Manage unlimited companies and contacts, profiled using your choice of custom user-defined fields, such as lead source, industry, company size, products of interest, and personal preferences to track customers and prospects in a manner that best suits your business.
- Access a complete history and 360-degree view of customer interactions and activity including emails, calls, notes, product purchases and deal-critical indicators including which email marketing campaigns they’ve received and recent service tickets created.
- Personalize the way you view information with an unlimited number of columns of data to view, search and sort on, with quick export to Excel with a single click.
- Create custom data entry windows for different teams that provide key fields relevant to each group.
- Search for contacts from your desktop with the click of a button with Maximizer Vista Gadgets.
- Maintain data integrity with duplicate record checking and mandatory fields.
- Search on any number of fields and create one-click access to frequently accessed lists of customers or prospects.



**Microsoft® Office®, Outlook® and Accounting Integration:** Stay focused on maximizing revenue by consolidating customer and prospect interactions in one centralized location. Facilitate convenience and ease of use with integration of Maximizer CRM with Microsoft Office, Outlook and your accounting program.

- Manage sales territories by setting up parameters for lead assignment, using any of your custom fields.
- Get maps and driving directions using the built-in Google™ Maps or Microsoft® Bing™ Maps for virtually any location in the world.

## **Efficiently pursue leads and improve productivity with fully integrated communications**

Stay focused on maximizing revenue by consolidating customer and prospect interactions in one centralized location. Facilitate convenience and ease of use with integration of Maximizer CRM with Microsoft Office, Outlook and your accounting program.

### **Email Templates**

- Merge customer information with quick sales email templates to enable efficient and timely follow-up.
- Leverage merge fields to maximize your productivity by quickly sending personalized, tailored messages to a number of customer records or to a saved list.
- Create your own email templates to use for prospecting, follow-up, welcoming new customers or any other activity.
- Save messages to customer or prospect record automatically for future reference.

### **Microsoft® Office®, Outlook® and Accounting Integration**

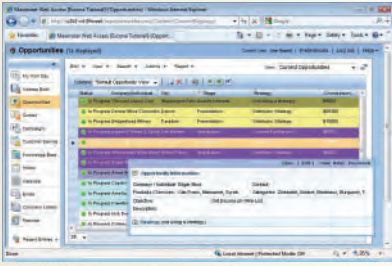
- Easy one-click access to Outlook within Maximizer stores emails sent and received through Outlook to each contact record.
- Maintain consistency across all communications with letter, email, quote and fax templates in Microsoft® Word, FrontPage or Excel formats.
- Shorten your sales cycle by quickly checking credit limits and instantly creating quotes and orders with accounting integration for Microsoft Dynamics™ GP and Intuit® QuickBooks®.

## **Optimize revenue generation by tracking progress toward targets**

### **Sales Quota Management**

Powerful tools, reports and visual dashboards in Maximizer CRM empower sales leaders and their teams to stay focused on generating revenue and to be held accountable for their results.

- Stay updated on team, territory and individual performance, ensuring accountability and the required level of motivation within your sales organization.
- Create powerful quota-based dashboard indicators for results at-a-glance.
- View exactly what you need to see by filtering annually, quarterly, monthly — based on your company's fiscal year.
- Share results through printed reports or quick, one-click export to Microsoft® Excel®.
- Manage administrative rights to create, view or modify quotas among team members.



**Conditional Color Highlighting:** Rate the quality of leads and stay focused on those with the greatest potential.

## Convert leads to solid sales opportunities

### Lead Management

The ongoing challenge of converting leads to customers is more easily achieved with the right process in place for efficient lead qualification, follow-up and nurturing. Capitalize on leads by ensuring timely assignment and follow-up, and closely tracking lead status, source and conversion. Promptly drill down to the qualified leads that matter and stay focused on maximizing revenue to meet your targets.

- Get alerted to new leads from web forms and other sources, then follow-up or re-assign quickly.
- Qualify leads efficiently by setting up fields to capture qualification criteria including budget, purchase timeline, need, prospects' authority level and more.
- Automate everyday tasks, catch critical time-sensitive issues and stay on top of priority opportunities. with email alerts to your inbox, using Workflow Automation<sup>ii</sup>.
- Import lead lists from virtually any file format.
- Create targeted customer lists for outbound call campaigns by filtering for specific criteria.
- Ensure timely follow-up and keep complete communication records with call tracking and notes.
- Alert the right people automatically<sup>iii</sup> regarding leads that have not been followed-up in a timely manner.
- Use Conditional Color Highlighting to rate the quality of leads and stay focused on those with the greatest potential.
- Increase lead response time by monitoring and responding to incoming emails with intelligent routing<sup>iii</sup> to the appropriate rep, while responding immediately to the sender and recording the interaction in the customer's record.

## Clinch top deals and keep priority customers satisfied

### Sales Opportunity Management

With the speed of business today, Maximizer CRM keeps sales professionals on top of priority opportunities at every step of the sales cycle. Implement your sales methodologies and have every sales person follow the same best practices in step-by-step activities to increase close ratios and maximize wins. From providing estimates to conducting product demonstrations or courting prospects, gain full control of the sales process by prompting sales representatives to conduct each activity within the appropriate time frame. Advanced sales tracking enables you to closely monitor deals, improve performance and forecast sales with ease.

- Use Sales Opportunities to track every qualified lead from early discussions through final sale.
- Apply sales methodologies and processes to every deal to increase your win ratio. Rate success factors and decision-makers for an accurate probability of close.



**Mobile CRM:** Respond to customers on-the-fly and view real-time information to improve sales effectiveness.

- Track all details and monitor the stages of deals, including key decision-makers and products being pitched.
- Create graphical sales reports, including your sales pipeline funnel, to forecast sales, monitor your pipeline and analyze win/loss results.

### Sales Opportunity Monitoring & Alerts

- Increase visibility into your team's activity and performance.
- Keep tabs on your biggest deals and most valued customers by staying alerted to important changes in their status.
- Determine what changes you need to be aware of and configure email notifications to be sent automatically whenever an opportunity has been modified.
- Facilitate timely response and collaboration by keeping account managers and partners up-to-date so they can take effective action.

### Order Management

Whether you take orders online or over the phone, manage your leads more effectively by integrating your quote and order management process with Maximizer CRM. From qualification to close, make the sales cycle a seamless buying experience for your customers.

- Create and track quotes and orders through the built-in Order Desk.
- Manage inquiries, create time-limited quotes, apply discounts and convert them into orders.
- Merge quotes into Word® templates to further customize communications.
- Track quote and order status, response and fulfillment through to shipping and payment.
- Automatically email customers with order summaries to manage expectations.

## Reduce downtime, increase face time, win more deals

### Maximizer Mobile CRM

Maximizer Mobile CRM<sup>iii</sup> keeps you on top of your deals with complete access to the critical customer and prospect information essential to achieving success. Leverage the power of mobile CRM on the latest BlackBerry®, Windows Mobile®, iPhone®, Nokia Symbian, Android® and other smartphones to build loyal customer relationships and win more deals.

- Quickly and easily navigate the new tab-based interface for BlackBerry® smartphones.
- Get real-time online access to entire Maximizer CRM database content.
- Look-up and update accounts, contacts and leads, including custom fields and notes for a complete history of interactions.
- Enable collaboration among team members on the road to set up multi-user appointments, assign tasks, update opportunities, and escalate service cases.
- Access and update details of sales opportunities to keep deals moving and forecasts accurate.
- Access the online document library to send brochures, quotes and other documents to customers and prospects on-the-fly, directly from your smartphone.

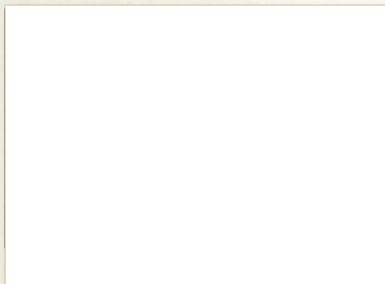
# Maximizer CRM 11 Features

- 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



- Log calls, SMS text messages and emails to customer records and eliminate the need to update records back at the office.
- Use the BlackBerry built-in address book and phone to create new records, opportunities and cases within Maximizer CRM.
- Plan your optimal day of appointments and activities by mapping multiple customers to your BlackBerry GPS to get turn-by-turn directions.<sup>iv</sup>
- Improve productivity in the field by viewing, creating and editing new documents on your smartphone.

## Social Networking

Leverage the power of online networks by tapping into collaborative web resources, instantly accessible through Maximizer CRM.

- One-click access to social networking sites including LinkedIn® and Facebook®, as well as Google® and other search engines to research your prospects before you make the first call.
- Build and improve the accuracy of your database with collaborative company and contact lists, downloaded from Jigsaw® and imported directly into Maximizer CRM.

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

- Accounting integration is available through Accounting Link, an add-on product with additional license fees.
- Requires Workflow Automation, powered by KnowledgeSync, an add-on product with additional license fees.
- Maximizer Mobile CRM is included with Maximizer CRM All Access licenses. Functionality and offerings vary across smartphone devices. Contact Maximizer Software for details.
- For BlackBerry devices running BlackBerry OS 4.2.1 to 4.6, only BlackBerry Map is supported. Driving directions are not available. For BlackBerry devices running BlackBerry OS 4.7 and later only, options to displaying multiple addresses, as well as driving direction "Get Directions" between two locations is supported.

## 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](http://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

**Call: 1-800-804-6299**

**Email: [sales@maximizer.com](mailto:sales@maximizer.com)**

**Web: [www.maximizer.com](http://www.maximizer.com)**

**Americas**  
604-601-8000 PH  
604-601-8001 FAX

[info@maximizer.com](mailto:info@maximizer.com)  
[www.maximizer.com](http://www.maximizer.com)

**Europe, Middle East**  
+44 (0) 1344 766900 PH  
+44 (0) 1344 766901 FAX

[info@max.co.uk](mailto:info@max.co.uk)  
[www.max.co.uk](http://www.max.co.uk)

**Australia, New Zealand**  
+61 (0) 2 9957 2011 PH  
+61 (0) 2 9957 2711 FAX

[info@maximizer.com.au](mailto:info@maximizer.com.au)  
[www.maximizer.com.au](http://www.maximizer.com.au)

**Asia**  
+(852) 2598 2888 PH  
+(852) 2598 2000 FAX

[info@maximizer.com.hk](mailto:info@maximizer.com.hk)  
[www.maximizer.com.hk](http://www.maximizer.com.hk)  
[www.maximizer.com.cn](http://www.maximizer.com.cn)