

# The highlights of Maximizer CRM 12: Winter 2012

## Group and Enterprise Editions

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

To be successful, your sales, customer service and marketing teams need access to critical customer information anywhere at anytime. You simply cannot afford to be disconnected from customer requests or potential sales opportunities because of limited access to your Customer Relationship Management (CRM) system. With access via mobile devices, the web or your Windows® desktop, Maximizer CRM 12 Winter 2012 gives you your choice of access — whether in the office, at home or on the road, its adaptable to your business processes to ensure the growth of the business' profitability.

With an unparalleled combination of mobile and web access to real-time data, social profile building and LinkedIn® integration, Maximizer CRM 12 Winter 2012 empowers you to attract, engage and succeed wherever you are.

With expanded capabilities in sales, mobile access and Microsoft® integration, combined with the convenience of an all-inclusive license, Maximizer delivers one complete CRM solution.

### Social networking

Build dynamic social profiles of customer and prospects by linking directly to relevant social networks and a contact's LinkedIn profile.

#### LinkedIn integration

- Prospect and generate new sales opportunities 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 target those with the greatest influence in the purchase 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 (blogs, Twitter®, Facebook®, LinkedIn).

### Mobile access

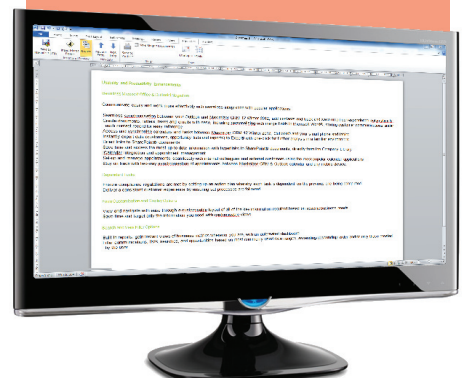
#### Intuitive user interface

With an intuitive user interface – optimised for the latest technology – mobile access enables you and your team to work productively and effectively, without boundaries. Just some of the benefits include:

- Provide teams throughout your organisation the freedom to choose between different browsers and devices
- Save money by removing the need to purchase and manage different applications based on mobile device: Maximizer CRM 12 Winter 2012 is fully accessible on popular mobile devices and tablets including: BlackBerry®, Apple iPhone®, Google® Android®, Apple® iPad®, BlackBerry® and Playbook®
- View and update your contacts, tasks,

#### Key Features:

- Account and contact management
- LinkedIn integration
- Time management
- iCalendar® integration
- Task management and automation
- Sales force automation & forecasting
- Marketing campaign automation & management
- Customer service management
- Microsoft Office® integration
- Outlook & Exchange synchronisation
- Business intelligence
- Workflow automation
- Partner relationship management
- Access options: mobile devices, Web, Windows desktop, remote synchronisation.



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 **Maximizer™**  
Simply Successful CRM

Access your CRM system via almost any mobile device and benefit from comprehensive CRM functionality on the move.



appointments, sales opportunities and customer service cases while on the road

- Search and filter by company, contact, opportunity, case or saved list or search
- Monitor critical business key performance indicators (KPIs) in real-time from any location with mobile dashboards and take immediate action
- Plan your day of appointments and activities by mapping multiple customers with one-click access to maps and directions from customer records
- Improved usability on larger screens, to make access via tablet highly intuitive
- Enhanced column display, enabling you to view more information on a smaller screen, ideal for smart phone use
- Find contacts more rapidly whilst on the move with the quick search capability from the home screen and more comprehensive search options in address book
- Save time by opening documents associated with address book entries<sup>i</sup>, calling or emailing a contact with one touch using a 'swipe' action and directly accessing Google Maps® via an address book entry
- Use the automatic login option to gain instant access without delays.

## Web access

View, organise and retrieve key customer information easier and faster with improved web access performance and navigation tools.

## Enhanced web access user interface

- Target only the key information you need in one consolidated window and customisable views
- Increase user adoption with the modern and intuitive interface that is easy to navigate
- View and organise customer information quickly and easily with the new 2-pane window and filter options.

## Improved performance and usability

- Enhance the level of communications and reporting with Microsoft Office®, Word® and Excel® integration
- Ensure data entry and automated workflow consistency throughout the organisation with improved web administrator rights
- Increase convenience and flexibility by accessing Maximizer CRM through internet browsers while retaining control of your data stored within your premises
- Enhance customer service with the ability to upload a photo to a contact, or company address book entry
- Execute campaigns from the convenience of the web with access to full marketing campaign functionality.

## Improved speed and navigation

- Save time and increase productivity with improved navigation and faster response time to commands
- Improve the level of customer service with the ability to retrieve contacts, customer service cases and opportunities directly from a company record
- Increase efficiency by performing

actions and printing notes directly from a contact's record.

## Improved functionality

Save time and money by inserting or updating address book entries via wizard driven HTML web-to-lead forms.

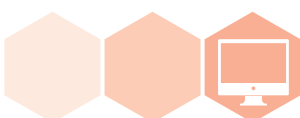
- Enhance contact understanding with a history following window which features a 'Facebook®' style feed that combines notes and documents into one chronological view
- Keep your CRM up to date with the latest tips, news and free documentation by connecting with Maximizer Software's LinkedIn, Twitter and Facebook sites via your Maximizer CRM
- Seamless synchronisation between your Outlook and Maximizer<sup>ii</sup>, add contacts and track and save email correspondence automatically.

## Sales

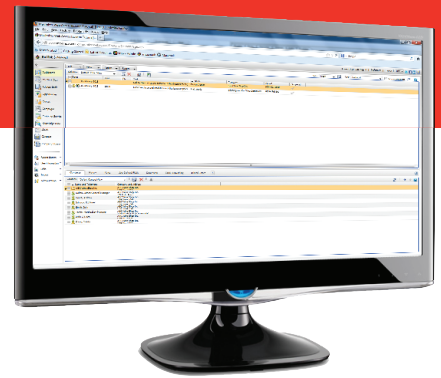
### Increase sales & close more deals

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.

- Update customer, lead and sales information anywhere, anytime with multiple access options – through a web browser or mobile devices and tablets
- Increase leads and close more deals by viewing and focusing on opportunities with the greatest potential (i.e. shortest lead time, highest revenue, highest



Achieve more on the web than ever before with comprehensive upgrades to Maximizer's web access in Winter 2012.



probability)

- Document the entire history of each customer's lifecycle – tracking conversations, transactions and incidents to help deliver greater value over time
- Manage unlimited companies and contacts, profiled using custom fields, such as lead source, industry, company size, and products.

#### Measure performance and potential

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

- Stay updated on team, territory and individual performance, ensuring accountability and the required level of motivation within your sales organisation
- Keep tabs on your biggest deals by staying alerted to important changes in their status
- Analyse opportunities and adjust strategy accordingly with instantaneous reports that deliver insight through sales pipeline funnels, lead summaries and forecast analysis
- Manage products, quotes and orders linked to sales opportunities to accurately track the entire sales and purchase cycle.

#### Optimise sales resources

Increase close ratios by modelling best sales practices that guide sales people through a proven process.

- Apply sophisticated, custom methodologies to better manage

unique opportunities, or take advantage of simple Action Plans and improved 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 representatives
- Track the progress of deals in the pipeline with territory reports.

#### Marketing

Target precisely to maximize response & return on investment (ROI)

- With the powerful, built-in campaign manager and email marketing engine, you can validate and execute more targeted, cost-effective campaigns
- Spend your marketing budget 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
- Comply with privacy, do-not-call and anti-spam legislation with out-of-the box, system enforced safeguards.

#### 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 optimise 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 organisation to ensure consistent branding and communications
- Save time and money by inserting or updating address book entries via wizard driven HTML web-to-lead forms.

#### Business intelligence

Make swift, effective business decisions, seize opportunities and refine processes with real time key performance metrics and status reports.

#### Dashboards

Build your own custom key performance indicators with Maximizer CRM dashboards, to gain instant insight into what matters to your business.



- Quicker, more comprehensive and more customisable dashboards than ever before
- Gain instant views of business metrics with an automated dashboard template that you can use right out of the box or customise to capture your own unique key performance indicators
- Share key metrics, save time and improve visibility across the organisation with the ability to email dashboards.

#### Reporting

- Save money and time by utilising built-in SQL Server Reporting Services (SRSS)
- Quickly and easily retrieve the reports you need with access to built-in reports for each of the main CRM modules (i.e. Sales Opportunities, Marketing Campaign ROI, Customer Service cases).

## 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
- Enhance contact understanding with a history following window which features a 'Facebook®' style feed that combines notes and documents into one chronological view
- Manage resource allocation to ensure your team's profitability
- Give service representatives 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
- Make the best use of specialised knowledge by assigning and escalating cases based on expertise
- Get clarity on interaction volume and assign staff to match demand on products, service lines or channels
- Ensure service agreements are renewed on a timely basis by tracking contract expiry 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

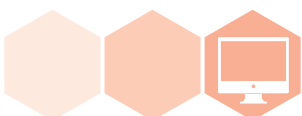
- Analyse case queues to ensure customer satisfaction and retention remains high
- Gain a clear view of your overall service record with real-time access to critical customer service metrics through the dashboard.

## Usability and productivity enhancements

#### Seamless Microsoft Office & Outlook integration

Communicate easily and work more effectively with seamless integration with popular applications.

- Seamless synchronisation between your Outlook and Maximizer CRM 12 Winter 2012, add contacts and track and save email correspondence automatically<sup>ii</sup>
- Create documents, letters, faxes and emails with ease, including personalising with merge fields in Microsoft Word®, storing customer communications under each contact record for easy reference
- Access and synchronise calendars and tasks between Maximizer CRM 12 Winter 2012, Outlook® and your smart phone and tablet
- Instantly export data (customers, opportunity lists and reports) to Excel® with one-click for further analysis in a familiar environment
- Direct links to SharePoint® documents
- Save time and access the most-up-to-date information with hyperlinks to SharePoint® documents, directly from the Company Library



Monitor opportunities and sales metrics to effectively manage and trigger next steps seamlessly.



- iCalendar integration and appointment management
- Set-up and manage appointments seamlessly with internal colleagues and external customers using the most popular calendar applications
- Stay on track with two-way synchronisation of appointments between Maximizer CRM & Outlook calendar and any mobile device.

#### Dependent tasks

- Ensure compliance regulations are met by setting up an action plan whereby each task is dependent on the previous one being completed
- Deliver a consistent customer experience by ensuring set processes are followed.

#### Form customisation and display options

- View and navigate with ease through a customisable layout of all of the key information required based on specific business needs
- Save time and target only the information you need with customisable views.

#### Search and view filter options

- Built-in reports: gain instant views of business metrics wherever you are, with an automated dashboard
- Filter communications, lists, searches, and opportunities based on most commonly used date ranges, ascending/descending order and/or only those created by the user
- Increase efficiency with quick access to and categorisation of information based on selected criteria

- Maximise productivity by sending personalised, tailored messages to an number of contacts by merging customer information from opportunities, customer service or address book modules
- Search, print and export (in your preferred format) the most relevant information in using the date filter option in notes and documents
- Conduct faster searches with the ability to choose only your own column setups, favorite lists, or saved searches.





## 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.

With headquarters in Canada and offices and business partners worldwide, Maximizer Software has sold over one million licenses to more than 120,000 customers since 1987.

### Certified Solution Provider



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### Technology Partners



### 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
- Flexible access options through web, desktop and mobile devices
- Value for money with low total cost of ownership and monthly subscription models
- Expertise as a leader in pioneering CRM development, with more than 20 years experience.

### Visit [www.max.co.uk](http://www.max.co.uk) for:

- A test drive of the latest release
- Information on how CRM can support your role
- Tools and eBooks
- Resources and information on Cloud based CRM
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