



OVERVIEW

Maximizer CRM 2018 Overview

| A COMPREHENSIVE LOOK AT MAXIMIZER'S LATEST CRM SOLUTION

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 **MAXIMIZER** CRM
EMEA

About Maximizer

Maximizer has been fueling the growth of businesses around the world for almost 30 years. Our CRM solutions come fully loaded with the core Sales, Marketing and Service functionality companies need to optimize sales productivity, accelerate marketing and improve customer service. With flexible on-premise and cloud deployment options, tailored-to-fit flexibility, state-of-the-art security infrastructure, industry-specific editions and anywhere/anytime mobile access, Maximizer is the affordable CRM solution of choice.

Maximizer CRM 2018 has been designed with connectivity in mind – to bring your teams, data, apps and customers closer than ever before. The new features like the App Directory, Data Import Manager and Partner Portal are designed to give you a single version of the truth and empowers you to deliver a seamless customer experience.



MAXIMIZER CRM 2018 NEW FEATURES & FUNCTIONALITY

- **Connect the dots between your data and your apps with free, easy-to-install integrations available from the app directory for everyday applications like QuickBooks, Outlook, Gmail, MailChimp and more.**
- **Get complete visibility into multi-channel sales and deliver a consistent end-customer experience with the new partner portal.**
- **Import data into your CRM with accuracy and ease with the new data import manager.**
- **Drive data integrity with minimal effort and update multiple records quickly and easily with the new global edit function.**
- **New user experience improvements including auto-formatting for phone numbers and drag and drop**

18 REASONS TO LOVE MAXIMIZER CRM 2018

1. **Connect with customers, partners and prospects like never before.**
2. **Flexible deployment options, our cloud or your own cloud with on-premise subscription.**
3. **Personalized: fit Maximizer to your business, with unlimited custom fields.**
4. **Integrate instantly with Outlook, Gmail, MailChimp and more through the App Directory.**
5. **Manage multi-channel sales through an optional integrated partner portal.**
6. **Update thousands of records at once, quickly and easily with the new global edit function.**
7. **Bring customer information together lightening fast with the express data import manager.**
8. **Secure data storage - choose our world-class Tier IV data centre, or your own.**
9. **Rapid deployment installation support and custom training gets you up and running, fast.**
10. **Easy access support users rave about: "Customer service is superb" Need we say more?**
11. **Live complimentary training webinars 6 times a week. Learning curve? What learning curve?**
12. **Anywhere, Anytime Access. Easily access & update information from your mobile phone or other device. 30% increase in sales calls – Maximizer Customers.**
13. **Deep customer insight two-pane multi tab display with drill down to important information.**
14. **Enhanced productivity. Say goodbye to repetitive tasks with pre-built work flows. 70% productivity savings – Maximizer Customers.**
15. **Configurable business processes. Set them up to match customer segments and lifecycle stages.**
16. **Create, modify and issue quotations easily with the integrate Excel Quoting Tool.**
17. **Low TCO & Fast ROI CRM pays back \$8.71 for every \$1 spent - Nucleus Research.**
18. **Your success is our success. 20% increase in revenue growth – Maximizer Customers.**

New in Maximizer CRM 2018

Productivity Boosters

- **App Directory** – You use multiple business applications each day, but wouldn't life be easier if your apps talked to each other. The new App Directory provides, quick, easy and free-to-install integrations for all your day-to-day apps including Quickbooks, Outlook, Gmail, Mailchimp and more.
- **Partner Portal** – Working across different countries and regions can mean relying on a network of partners and distributors to serve your end customers. The new partner portal means you and your partners can work within the same CRM so that you have full visibility into your sales, but your partners only see the sales leads and opportunities they need to see.
- **Data Import Manager** – Even with all the integrations in the world, there will always be the need to import data into your CRM. The new sophisticated import tool allows you to do just that, quickly, easily and with accuracy. You can import data into your CRM and update and append existing records without compromising data integrity in the process.
- **New Global Edit** – Managing your data can be a labor-intensive process, especially when updating numerous records with the same values. The global edit tool allows you to select multiple records and update them in one go. With the progress tracking bar, you can also continue working in the CRM while your global edit processes.
- **Business Processes for Each Customer Segment** – Why treat all customers the same when you can tailor your business processes and opportunity stages to match the buying lifecycle of each customer group? Set up business processes for each segment to provide proactive, relevant service and support.
- **Automatic Elapsed Time/Duration Calculation** – Automatically calculates elapsed time from a start date. Easily setup to track critical timeframes such as time passed since last contact, contract renewal dates and personal anniversaries. Can be

used to automatically update data displayed in dashboards, searches and column views.

- **Automatic Update of Last Contact Date** - Automatically tracks when a client was last contacted, based on emails sent, appointments completed, manually-set date and more. Can be used to highlight clients with pending and overdue contact and more.
- **Customized templates for appointments and reminders** - Elevate the professionalism of your communication by creating branded email templates for notifications and reminders. Create multiple templates for different audiences or communication types, with headers and footers that reinforce your corporate story.
- **Simplified Reporting Setup** - Choose a column setup before generating a report to view the exact dataset you need. Simplified one-click report generation gets you relevant information faster and easier.

User Experience Enhancements

- **Modern, clean interface** - Fresh colours, easy to read type
- **Calendar Usability** - Significantly easier to see the availability of co-workers and resources such as meeting rooms, ownership over appointments you set up, easy to read appointment details.
- **Module identification** - Clearer identification of which CRM module you're working in.
- **Floating Notification Panel** - Non-intrusive notification of events, tasks, etc. even when your browser window is minimized (Chrome, Firefox only).

Expanded Integration Infrastructure

- **Custom Notifications** Set your own criteria for when and how you receive notifications of events.
- **Unlimited Quick Search** - Preset an unlimited number of quick searches based on lists you create.

The All-Inclusive Maximizer CRM Solution

Sales Management Functionality For Maximum Team Productivity

With all client information centralized in a single view that's accessible anywhere, anytime, it's easy to respond to new and existing opportunities, manage accounts and accurately forecast your sales pipeline and revenue.

Effectively Manage Accounts - Build long term customer relationships, manage accounts and personalize your view. Search on any field and create one-click access to frequently used customer and prospect lists. Manage sales territories by setting up parameters for lead assignment and record access.

Increase Close Rates - Monitor the effectiveness of your sales team by measuring close, abandon and loss rates for all opportunities. Discover where to focus sales efforts and move towards a predictable sales pipeline.

Improve Sales Forecast Accuracy - Built-in sales forecasting and management makes light work of tracking progress against goals. Graphical sales reports that match your sales process provide visibility into every detail including probability of close, allowing you to take proactive measures to ensure your team hits their targets.

Effectively Manage Sales Leads - Ensure all leads are handled in a timely manner, leading to higher sales conversion and revenue. Automatically alert the right person for follow up, and track the status and source of every opportunity to measure funnel and conversion rate.

Real Time Insight - Stay on top of productivity and revenues with real-time visual snapshots of company and team performance. Easily configure dashboards and customizable report templates to provide the insight needed to adjust tactics or re-focus resources.

Anywhere, Anytime Mobile Access - Easily manage appointments, view critical customer and prospect data and monitor key metrics from your desk, at home or on the road with 24/7 access via any smartphone, tablet or any web-enabled mobile device.

Marketing Functionality For Personalized Customer Communications

Consumers do their own research long before reaching out to talk to your sales team, so it's critical to provide them with the information they need to make a purchase decision. Automated multi-phase campaign scheduling, list management, web forms, and a Return On Investment (ROI) calculator make it easy to deliver the content customers and prospects need, and ensure you spend your marketing budget and resources wisely.

Fill the Sales Pipeline with Qualified Leads - Segment your customers and prospects to receive relevant information targeted to each audience. List management capabilities allow you to search and filter data, ensuring your campaigns move targets along the buyer's journey and prepare them for a sales conversation.

Automated Campaign Management - Maximizer's Campaign Manager makes it easy to execute multi-

phased email campaigns that automatically nurture relationships over time. Events like site downloads, purchases and service incidents can trigger specific automated email campaigns that offer appropriate and timely resources.

Web-To-Lead Forms - Wizard-driven web forms capture online enquiries which can be customized, branded and used for a variety of marketing campaigns, from free trials to event registration, online surveys and more. Form data can be imported directly into Maximizer and into the hands of the right sales person.

Monitor Key Metrics - In-depth marketing dashboards provide insight into every campaign performance, lead source tracking and more. Get real time insight on conversions from leads to opportunities, opportunities to sales, and measure Marketing's contribution to business success.

Integrate with MailChimp - Keep marketing campaign data in sync and see individual results from MailChimp email campaigns within Maximizer via two-way synchronization of contact and campaign data between Maximizer CRM and MailChimp.

Customer Service & Support Excellence

The future of your business depends on your ability to keep customers happy. In doing so, they'll reward you with repeat business, bigger orders and valuable referrals. Maximizer makes it easy to arm your Customer Service team with all the information they need to answer questions, resolve issues quickly and turn customers into champions.

Unified Information - Empower Customer Service with the background information they need for resolution-focused conversations.

Capture email, phone, web and even Sales data points to provide a complete case history of origin, severity, priority, status, previous communication and all related documents.

Case Management - Easily raise resolution tickets, complete with case numbers, product categories, assignments and other details that are fully searchable for quick access. Use alerts and notifications for faster response time and escalation of more serious issues to subject matter experts.

Central Knowledge Base - There's no need to reinvent the wheel when you can share details on successful incident resolution, frequently asked questions and detailed product information with your Customer Service team and customers in a searchable online library.

Customer Self-Service - Reduce administration and improve data quality by giving customers access to your database and select fields. Customers simply login via a web portal integrated with Maximizer to update their contact data and view service case and order status.

Computer Telephony Integration (CTI) -

Detect and display corresponding records, capture critical client history and improve call accuracy for both inbound and outbound calls.

Service Level Insight - Track team performance across key metrics with pre-built dashboards and customizable reports, plus use the intelligence to improve service levels and speed of response over time.

Flexible Deployment Options

Maximizer CRM - Our Cloud or Your Server -

Maximizer CRM Live, hosted in the cloud, gives you access to all Maximizer CRM 2018 features and functionality automatically. And you can rest

assured that your information is stored in a Tier IV data centre with world-class reliability and security.

You can choose to host your Maximizer CRM solution on a dedicated server in a private hosted cloud that isn't shared with other companies, and include other business software you use to significantly lower costs.

Maximizer CRM On-Premise Web Access -

Maximizer CRM 2018 can also be deployed on-premise, via your own internal web access server.

Partner-hosted Maximizer CRM - Your Maximizer CRM solution can be hosted with one of our Certified Solution Providers.

Third Party Data Centre Hosting - If you use a third party data centre to host other cloud services and applications, you can maximize your investment by installing the Maximizer web-access solution on your existing third party infrastructure.

Analytics For insight-Driven Decision Making

Not only does the Maximizer CRM two-pane, multi-tab display highlight important information and drill down for deeper insight, the pre-built reports and dashboard make it easy to Interpret crucial metrics, turning data into information, and knowledge.

Business Intelligence - Pre-built sales, marketing, service and management-focused dashboards and more than 175 pre-designed reports put customer analysis and actionable information into the hands of decision-makers and help them solve problems, seize opportunities and refine everyday processes.

Configurable Dashboards - Real time, configurable snapshots of Key Performance Indicators (KPIs) allow leaders to respond to sales, marketing and service performance, and adjust tactics or resources quickly. View results at a glance in your preferred format, drill down or export to Excel to investigate further.

Pre-Built Excel® Reports - Find critical information, identify and analyze trends and make better decisions using ready-made Excel report templates for the Address Book, Customer Service, Opportunities and Campaigns. Modify reports to meet exact requirements, then upload them to the Report Library for future use.

Mobile CRM For Anytime, Anywhere Access

When on the road or working from home, you can access vital customer data, along with your tasks and reports via your smartphone, tablet or laptop.

Access to Real Time Information - Remote team members can access current contact details and update sales opportunities, marketing campaigns and customer service cases.

Manage Tasks On-The-Go - Update contact details, tasks, calendar appointments, sales opportunity data and customer service case information anywhere, anytime.

Stay Connected - Easily search for key contacts and accounts directly from the home screen, send emails or make phone calls with a single one-click touch. When remote employees upload new contact or account details, they automatically synchronize to ensure on-site teams see the same information.

Data Security

Your data is stored in our world-class Tier IV data centres (or a data centre of your choice), and

protected by CRM Services that monitor and regulate access and usage. Compliance with ISO27001 ensures your software and data are protected 24/7 by stringent security standards. And your data belongs to you, now and forever.

Configurability

We give you the power to change field names and add unlimited custom fields to match your unique needs. Create new fields in the Address Book as well as under Opportunities, Campaigns and Customer Service, and choose from alphanumeric, date-based, formula-driven, numeric, table and yes/no field types.

Rapid Deployment

Our team of highly experienced Professional Services Consultants and global network of Certified Solution Providers can help transform your business while maximizing the value of your CRM software.

Certified Consultants with deep technical expertise in cloud technologies, web development and integration are available worldwide to support your full implementation lifecycle; from closed loop lead tracking to sales forecasting, customer service, activity tracking and much more. Choose from a range of professional services options, including installation support and customized training, to get you up and running quickly and smoothly.

Service Packages

Maximizer has developed a range of support packages for Maximizer CRM Live to help you successfully navigate your way through CRM adoption. The packages consist of an assortment of support and training resources that complement your own levels of knowledge and experience, providing the necessary tools and long term knowledge transfer to deliver your CRM effectively and efficiently.

Support Users Rave About

We ask customers what they like best about working with Maximizer. “Customer Service is superb” “Technical Support is excellent” Need we say more?

Live Complimentary Training Webinars

Customers told us they wanted to learn how to use Maximizer CRM to the max, so we host live, complimentary training webinars 6 times per week. Every year, thousands of users attend the basic, intermediate and advanced sessions to expand their skill set and the value they get from Maximizer CRM.

Low Total Cost of Ownership and Fast ROI

One of the biggest concerns associated with cloud CRM is the long-term total cost of ownership (TCO). A landmark TCO study conducted by the Yankee Group on hosted CRM systems versus on-premise solutions for SMEs concluded that on-premise CRM solutions were considerably more expensive over the course of a five-year period than cloud-based alternatives.

The Yankee Report found these key advantages for cloud-based CRM solutions:

- Faster implementation and ramp-up time to productive use of applications
- Lower upfront and ongoing costs
- No additional IT infrastructure for servers, networks, storage and IT resources to support them
- No additional IT application support staff
- Guaranteed service-level agreements (SLAs)

- Vendors provide an enterprise-class infrastructure with appropriate servers, networking and storage systems; plus, they are responsible for frequent upgrade application with each new version release, regular customer data backups and required restores, as well as meeting the latest security and compliance requirements.

Maximizer CRM Live takes very little time to deploy and update, has the core features and functionality businesses need to grow and be more productive and, most importantly, generate a healthy ROI – at a low total cost over the long term. Maximizer CRM customers reap big benefits by building deep customer relationships that lead to more sales.

18 REASONS TO CONNECT WITH MAXIMIZER CRM 2018



- 1 **CONNECT**
with customers, partners and prospects **like never before.**



- 2 **FLEXIBLE DEPLOYMENT OPTIONS**
Our cloud or your own cloud with on-premise subscription.

PERSONALIZED

- 3 Fit Maximizer to your business, with unlimited custom fields.

SUBMIT



- 4 **INTEGRATE INSTANTLY**
with Outlook, Gmail, MailChimp and more through the App Directory.

- 5 **MANAGE MULTI-CHANNEL SALES**
through an integrated partner portal.

- 6 **UPDATE THOUSANDS OF RECORDS AT ONCE**
Quickly and easily with the new global edit function.

- 7 **BRING CUSTOMER INFORMATION TOGETHER**
Lightening fast with the express data import manager.

- 8 **SECURE DATA STORAGE**
Choose our world-class Tier IV data centre.

- 9 **RAPID DEPLOYMENT**
Installation support and custom training gets you up and running, fast.

- 10 **EASY ACCESS SUPPORT USERS RAVE ABOUT**
“Customer service is **superb**” Need we say more?

- 11 **LIVE COMPLIMENTARY TRAINING WEBINARS 6 TIMES A WEEK.**
Learning curve? What learning curve?

- 12 **ANYWHERE, ANYTIME ACCESS**
Sales, Service, Marketing, Analytics – In an all-inclusive CRM solution.

- 13 **DEEP CUSTOMER INSIGHT**
Two-pane multi tab display with drill down to important information.

- 14 **ENHANCED PRODUCTIVITY**
Say goodbye to repetitive tasks with pre-built work flows.
70% productivity savings – Maximizer Customers.

- 15 **CONFIGURABLE BUSINESS PROCESSES**
Set them up to match customer segments and lifecycle stages.

- 16 **EASY QUOTATION CREATION**
Create, modify and issue with integrated Excel Quoting Tool.



- 17 **LOW TCO & FAST ROI**
CRM pays back \$8.71 for every \$1 spent – Nucleus Research.



- 18 **YOUR SUCCESS IS OUR SUCCESS**
20% increase in revenue growth – Maximizer Customers

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From offices in North America, Europe, Middle East, Africa and AsiaPac, and a worldwide network of certified business partners, Maximizer has shipped over one million licenses to more than 120,000 customers worldwide.

Certified Solution Provider

collier pickard
the CRM experts 

Collier Pickard have been providing CRM systems for 20 years. We provide a professional, friendly and helpful environment in which our experienced team can work with you through every stage of the life of your CRM system.

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