

Enhancement tools for Maximizer CRM by Collier Pickard

Since 1987, more than 1 million users and over 120,000 companies have trusted Maximizer to help them boost their corporate bottom line. With top-rated tools for contact management, lead management and customer service, Maximizer CRM gives businesses nearly everything they need to grow - all in one place.



Faster, quicker, better—add-ons that increase efficiency and effectiveness

At Collier Pickard, we have designed a number of enhancement tools for Maximizer CRM that can easily be added to the core system. They are listed in this document along with a brief summary of what they do. For more in-depth information about each enhancement tool and how to integrate it with your Maximizer CRM system, please contact us!



Overview of enhancement tools for Maximizer CRM

P45	Manages people who leave a company - easily and effectively.
Proximity Indicator	Searches for companies and/or contacts within a radius of a particular record.
How Far From Here	Makes it easy for you to identify how far people are from one or more locations.
MaxHello	Sends people who complete a web form a welcome email.
MaxCountrySearch	Adds "Search by Country" to the search menu.
MaxSMS	Sends single or bulk SMS messages from within Maximizer.
MaxMobileClean	Reformats UK mobile numbers to +44 7... for use by MaxSMS
Unique Opportunity ID	Ensures each Opportunity gets its own manageable ID number.
Global Edit From List	Allows you to update a bulk-user defined field (UDF) from an external list, such as Excel.
Dotdigital	Multiple integration options with this marketing automation platform.
Scheduled Licence Report	Notifies you of how many enabled users there are.
Scheduled Log-In Report	Tells you who logged in to Maximizer, to what module and when.
Bid Grid	Helping you automate your assessment of sales opportunities.
Value Grid	Helping you profile customers easily, accurately and consistently.

P45



The Maximizer P45 button effectively manages contacts who have left companies—without losing their historic notes and other associated information within the system. It prefixes their first and last names with ZZ, ensuring that the contact remains on your database for reference but places them at the bottom of the Contacts window. It also marks the contact as Do Not Solicit by Email, Fax, Phone, Print - ensuring you honour these settings if they are accidentally included in an email campaign or if an attempt is made to call them from within the phone dialog box.

Proximity Indicator

The Proximity Indicator makes it easy for you to search for companies in your Maximizer CRM system that are located within a specified area of your choice. You can choose a radius or doughnut; how narrow or wide you want to make your search, and search in miles or kilometres.

Who does this help? Well, it makes it easier for your marketing team when conducting regionally focussed campaigns and events, and it helps your sales team when they're planning visits to clients and prospects.



How Far From Here

How Far From Here makes it easy for you to identify how far people are from one or more locations. How is this useful? Marketing people may want to know how far they need to travel when planning seminar invites or regionally focussed campaigns. Sales Managers need to maximise their peoples' use of time when planning visits to clients, prospects or suppliers. Operations people may want to identify the closest Centre to despatch an Engineer from. So this tool helps you make the most of your time when planning various trips.



MaxHello

With MaxHello, you can automatically send anyone who completes a web-form a welcome or acknowledgement email. It automatically adds people to a Favourite List, which can then be used for a Maximizer Campaign, making it easy for your marketing team to automate aspects of their email marketing campaigns. So whether your audience have signed up for a webinar, requested contact or downloaded material from you website, MaxHello ensures they will have the right email follow-up.



MaxCountrySearch

If you have clients, prospects and suppliers who are based around the world, you might want a quick way to search for a country. MaxCountrySearch facilitates this by adding "Search by Country" to the Maximizer Quick Search menu, saving you time.



MaxSMS

MaxSMS allows you to easily transmit and track the delivery of SMS messages, either to a single recipient or many thousands as a bulk message. The application seamlessly extracts the cell numbers from a list of selected contacts so that a particular message can be sent to all of the contacts at once, with the option of the delivery date and text of the message automatically being saved to the contact's notes field.



MaxMobileClean

It's not uncommon for UK mobile numbers to be stored in your Maximizer system in the standard way - that is, starting with 07xxx xxxxxx. But if you're using MaxSMS, then the format must be an international one, so using MaxMobileClean will save you a lot of time as it tidies up UK mobile numbers to a +44 7xxx xxxxxx format for use by MaxSMS.



Unique Opportunity ID

Having the ability to assign your own unique ID number to an Opportunity in a manageable size means you don't have to rely on Maximizer's 23 digit unique ID. This means you can create your own reference system for documents, quotes, enquiries etc., whilst also making it easy to search for certain records.



Global Edit From List

This application is designed to work with Maximizer Web Access and allows a user to update a table's user defined fields (UDF's) from an external list, such as Excel. It works by searching Maximizer for an alphanumeric UDF and then updating a table UDF item for the records found - at company, contact and individual level. For example, you may have a list of bounced email addresses from a campaign that you need to update in Maximizer with "Do Not Solicit" by field to email.



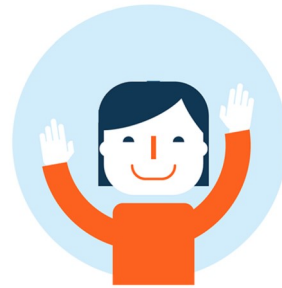
dotdigital

Multiple integration options. These are designed to enable Maximizer to continue to act as your single customer view and to enable you to segment your database so that you can use the targeting power of dotdigital. These include automatically pushing Maximizer data to specific dotdigital accounts or address books based on Administrator definable rules; updating Maximizer UDFs with dotdigital suppression information; pushing an ad-hoc Maximizer list into dotdigital and more.



Scheduled License Report

How many enabled users are there? For clients with a large estate and perhaps multiple databases, this report enables you to check that leavers have been disabled and to see when users were created. The report can be scheduled to run on any database sitting on full SQL.



Scheduled Log-in Report

The Scheduled Log-in Report allows you to see who logged in to Maximizer, when they logged in and which module they used to log in (e.g. mobile or web). This enables management to understand how your Maximizer system is being used by your users, and to help identify those who might need some encouragement or extra training.



Bid Grid

The Bid Grid helps you achieve consistent and accurate forecasting through an automated assessment of your sales opportunity status.

A sales person will often rely on experience and gut feel to estimate the probability of closing a deal. We have developed a question-and-answer grid, based on years of experience and best practice, to help improve forecasting and act as a guide in long term account development. We call this tool the Bid Grid.



Value Grid

The Value Grid helps you evaluate the long term value of customers. By profiling the relationship you have with each organisation, you can target specific areas of every relationship and boost long term customer satisfaction, retention rates and revenue growth.

The Value Grid has been developed by us to help you profile customers easily, accurately and consistently. It enables the quantification of opinion as it translates elements of the account manager's "gut feel" into a measurement, which ranks customers against one another in order of value or worth.



Further information

How do these enhancement tools work?
Get in touch today and we'd be happy to show you and discuss how they can meet your business requirements.

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