



# Sales Force Automation

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

## Key Benefits for Sales

- Gain real visibility into sales performance to guide your team
- Maximize sales productivity with the tools they 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

*“We have seen a 500% return on our investment with Maximizer CRM. We wouldn’t have been able to develop our global sales force without it.”*

Cam Buschel, Sales Analyst  
StemCell Technologies

## *Increase productivity and sales effectiveness to maximize wins*

From quote to contract, sales executives and frontline sales professionals face the challenge of higher customer and prospect demands, greater competition and economic uncertainties. 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 — when they need it, how they want it — at their desk, from home, or while on the road. Maximizer CRM is the simple, accessible, end-to-end customer relationship management (CRM) solution that optimizes sales performance, provides sales pipeline and forecast insight, helps increase revenue, and empowers staff to develop long-term customer relationships that drive business forward.

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

### *Maximizer Mobile CRM<sup>i</sup>*

Meeting the higher expectations of today’s customers and prospects demands that you respond on-the-fly armed with knowledge of customer circumstances. Maximizer Mobile CRM 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 CRM on the latest BlackBerry®, Windows Mobile®, iPhone® and Palm® smartphones<sup>i</sup> to build loyal customer relationships and win more deals.

- Look-up and update accounts, contacts and leads, including custom fields and notes for a complete history of interactions
- Team up with colleagues on sales opportunities, sharing calendars and tasks — anywhere, anytime
- Access and update details of sales opportunities to keep deals moving and forecasts accurate
- Access online document library to send brochures, quotes and other documents to customers and prospects on-the-fly, directly from your device
- Plan your route on-the-fly with quick access to online maps from customer records
- Log calls, SMS text messages and emails to customer records and eliminate the need to update records back at the office
- Save precious device capacity with Secure Digital (SD) card storage
- Integration with BlackBerry built-in address book, email<sup>ii</sup> and phone enables you to immediately create new records, opportunities, cases and notes within MaxMobile
- Schedule meetings or required tasks directly from BlackBerry email<sup>ii</sup> to MaxMobile
- Monitor the status of your business and team performance at a glance, with dashboards<sup>ii</sup> and reports accessed through your mobile web browser



*Mobile and Web Access with Maximizer CRM: Empower staff with critical customer and sales information — no matter where they are.*

*“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

## **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 proposals, orders, project details, emails and calls — you are equipped with the necessary information for building intimacy, earning loyalty and driving repeat business.

- Manage unlimited contacts, profiled with your choice of custom fields, such as industry, size, and other fields suited to your business’ way of tracking customers
- Access complete history and 360-degree view of customer interactions and activity including emails, calls, 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
- Create custom data entry windows for different teams that provide key fields important to each group
- Search for contacts from the desktop with the click of a button with Maximizer Vista Gadgets
- Maintain data integrity with duplicate record checking and mandatory fields
- Search on any field and create one-click access to frequently accessed lists of customers or prospects
- 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 Microsoft® Virtual Earth™ for virtually any location in the world

## **Increase productivity with one-stop communications and integration with familiar programs**

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

Stay focused on maximizing revenue by consolidating customer and prospect interactions into one convenient solution. Continue ease of use with integration of Maximizer CRM with Outlook and your accounting program.

- 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
- Shorten your sales cycle by quickly checking credit limits and instantly creating quotes and orders with accounting integration<sup>iii</sup> with Microsoft Dynamics™ GP and Intuit® QuickBooks®



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

## Convert leads to solid sales opportunities

### *Lead Management*

The ongoing challenge of converting leads into 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 powered by KnowledgeSync<sup>™</sup>
- Import lead lists from virtually any file format
- Ensure timely follow-up and keep complete communication records with call tracking and notes
- Automatically alert<sup>™</sup> the right people to unpursued leads for follow-up
- Update and rate quality of leads to stay focused on hotter leads
- Create targeted customer lists for outbound call campaigns
- Increase lead response time by monitoring and responding to incoming emails with intelligent routing<sup>™</sup> to the appropriate rep, while responding immediately to the sender and recording the interaction in the customer's record

## Capitalize on opportunities to maximize sales success

### *Sales Opportunity Management & Forecasting*

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 in the system 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 opportunities to track every project, deal or 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
- Monitor your deal stage and push to close more deals
- Track all details of the deal, including key decision-maker and products being pitched, and watch your probability of close increase
- Use graphical sales reports, including the sales pipeline funnel, to forecast your sales, monitor your pipeline and analyze your win/loss

## Quote & 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, fulfillment, through to shipping and payment
- Pre-authorize, capture payments or process refunds in real-time with the credit card transaction processing gateway
- Automatically email customers with order summaries to manage expectations

## Set your sales team up for success

### On Demand Sales & Professional Coaching

Increasing your top line sales results means going beyond the motions of processing and qualifying leads. Encourage skill advancement and professional development with CanDoGo™ on-demand sales coaching available directly through Maximizer CRM. CanDoGo helps you work more efficiently, improve sales effectiveness, increase revenue and be recognized within your organization as a leader. Whether you're looking for tips on deal negotiations, advice on time management or guidance on team leadership — get immediate answers to your sales and business questions and gain the knowledge to help you succeed.

- Search, click and learn from quick-hitting, relevant guidance
- Improve staff and management performance
- Retain valuable training content year-round
- Access knowledge from over 100 renowned sales gurus and coaches, including Zig Ziglar, Tom Hopkins, Denis Waitley and Tony Parinello
- View CanDoGo Insights™ directly from Maximizer CRM — small, relevant sound bites of knowledge in text, audio, or video formats that instantly answer your sales questions

### 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® directly into Maximizer CRM

## 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 pre-configured and customizable dashboards and 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 to meet deliverables. Forecast effortlessly and take proactive measures to ensure your sales team hits revenue targets.



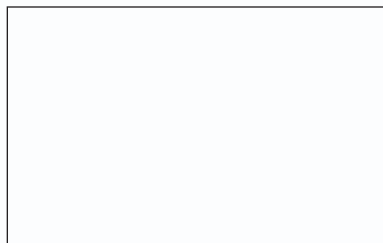
## Maximizer CRM 10.5 Features

- 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
- eBusiness
- Access options: Mobile devices, web, Windows desktop, remote synchronization

### Technology Partners



### Certified Solution Provider



- Drag-and-drop dashboard with your choice of key performance indicators (KPIs) provides personalized view of metrics in one glance
- Spend more time on 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
- Easily recognize trends and performance patterns by continuously monitoring KPIs such as value and status of leads and forecasted sales, then drill down to see further details
- Personalize each rep's workspace to show the day's priority tasks, appointments and progress on their own KPIs
- Gain actionable insight by starting each day with a management dashboard to get a visual health check on opportunities, leads, cases and account status
- Get at-a-glance updates without needing to open Maximizer CRM, using Maximizer Vista Gadget KPIs
- Leverage detailed reports to gain further clarity as to which tactics work most effectively.
- Automatically trigger reports to be emailed to you on your schedule, or based on a critical threshold of activity with your opportunities or leads
- Monitor productivity and individual performance through the collaborative business calendar, phone logs and notes that track and time activity by product and category

- Using Maximizer Mobile CRM requires Maximizer CRM licenses, server, and MaxMobile licenses. Functionality and offerings vary across smartphone devices. Contact Maximizer Software for details.
- Included with Maximizer CRM 10.5 Freedom release.
- Accounting integration is available through Accounting Link, an add-on product with additional license fees.
- Workflow Automation powered by KnowledgeSync is an add-on product with additional license fees.
- Requires Workflow Automation powered by KnowledgeSync, an add-on product with additional license fees.
- CanDoGo access available with additional subscription directly through Maximizer Software.

### Why Maximizer CRM 10.5

1. **Simple** and quick to deploy, learn, use and maintain.
2. **Access** to critical information through mobile devices, the web and Windows desktop options.
3. **Best value** in its class for full-featured CRM.

Maximizer CRM helps small and medium-sized businesses maximize sales, customer satisfaction and profitability through increased business productivity and optimization of limited resources.

### 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

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 phone  
604-601-8001 fax  
[info@maximizer.com](mailto:info@maximizer.com)  
[www.maximizer.com](http://www.maximizer.com)

#### Europe, Middle East, Africa

+44 (0) 1344 766900 phone  
+44 (0) 1344 766901 fax  
[info@maximizer.co.uk](mailto:info@maximizer.co.uk)  
[www.maximizer.co.uk](http://www.maximizer.co.uk)

#### Australia, New Zealand

+61 (0) 2 9957 2011 phone  
+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 phone  
+(852) 2598 2000 fax  
[info@maximizer.com.hk](mailto:info@maximizer.com.hk)  
[www.maximizer.com.hk](http://www.maximizer.com.hk)