



# Automate Business Processes with Workflow Automation

Build a Competitive Advantage with Action Plans and Workflow Automation, powered by KnowledgeSync

## Key Benefits

- Identify tasks that require immediate attention
- Ensure critical processes are never left unattended
- Provide everyone with the up-to-date information necessary to do their job successfully
- Save money by automating time consuming manual processes and improving productivity
- Discover further opportunities for customer interaction

*“Using Workflow Automation to automate processes has saved us over 25 staff hours per week in manual tasks; moreover, being able to monitor processes has enabled staff and managers to more effectively communicate customer needs to our product development groups. We are continuing to identify processes for Workflow Automation to manage for us to further decrease manual tasks and route our customers’ valuable feedback throughout our company.”*

*- Chris Beasley, Systems Engineer,  
LifeWay Christian Resources*

While the competition struggles to develop manual sales forecasts or to identify new leads in an ad-hoc way, you can gain a competitive advantage by defining and automating your critical business processes.

The potent combination of Action Plans and Workflow Automation, powered by KnowledgeSync<sup>1</sup>, makes building great customer experiences possible by streamlining processes and reducing work for frontline staff. Action Plans streamline the assignment of tasks to people based on milestone events. Flexible and easy to configure, you can create any number of action plans to support business processes, whether for simple sales processes, marketing projects or customer service actions. To automate tasks, such as assigning web leads or notifying staff of service escalations, or to monitor processes - Workflow Automation has the engine to accomplish many tasks and ensure the right people in your organization take action when necessary.

## Keep Tabs on Business and Act Quickly

- Gain actionable intelligence into your critical business processes and receive alerts by email, fax, pager, PDA or phone so you can respond to time-sensitive information wherever you are.
- Workflow Automation comes complete with over 90 pre-configured queries and 50 events (actions) to help you get started.
- Monitor processes and information in Maximizer Enterprise and in other applications such as accounting or inventory systems for greater visibility and staff accountability for important daily activities. Examples:

### Lead Management:

- ✓ If a hot lead has not been contacted within a set number of days, automatically send an alert to the sales manager and schedule a follow-up call with the appropriate account manager.
- ✓ Alert the sales manager when a hot lead has been created without a corresponding opportunity.
- ✓ Monitor web leads, import them into Maximizer Enterprise and place them into a one-on-one follow-up email campaign and alert the appropriate account manager.

### Sales Opportunity Management:

- ✓ Notify the sales manager when a sales representative loses more than a specific number of deals in a given time frame, or has deals that are more than two weeks overdue for closing.
- ✓ Set the system to alert the sales manager when an opportunity has been abandoned, lost or suspended with no reason so you can obtain the reason for accurate win/loss analysis.

### Customer Service Case Management:

- ✓ When more than four customer service cases are entered for one customer in a given week, send an alert to the customer support manager and the appropriate account manager.
- ✓ Keep sales and support professionals aware of the fact that a new customer support case has been created.
- ✓ Send an email alert to a business partner or reseller when their client calls for customer support.



### Staff/Performance Management:

- ✓ Receive exception reports. For example, receive alerts when employees enter inconsistent data such as missing contact information, or provide unauthorized discounts on products.
- ✓ Send reminders to remote sales reps who haven't synchronized with the main system for three days.

**Automatic Alert: Lead has not been followed up - Message (Plain Text)**

This is an automatic alert from Business Enterprise Workflow Automation.

A lead worked on "hot" for Account Manager Matt Brown, has not been followed up. A hotlist task has been created for Matt Brown to call the lead today.

Lead Name: Edgar Brown  
 Contact: Bill Edgar  
 Phone: 555-555-5555  
 Lead Source: Visa Festival

**Customer Service Case Workload Report**

Case Workload by Service Representative

Service Representative	# of Cases	Average Days Active	Open	Target
John Smith	1	82 Apr	10 Apr	10 Apr
Jane Doe	1	82 Apr	10 Apr	10 Apr
Sam Park	1	80 Apr	80 Apr	80 Apr
Wendy Wilson	1	80 Apr	80 Apr	80 Apr
Michelle Lee	2	82 Apr	10 Apr	10 Apr

**Summary**

Billie Holly  
 # of Cases: 1

### Get Business Insight on a Regular Schedule or Just-in-Time

- Schedule regular Crystal Reports® to be generated and distributed automatically. For example, schedule sales forecast reports to senior executives every Monday at 9:00 a.m.
- Generate and distribute reports when a certain action within Maximizer Enterprise or other application occurs. For example, if an account manager abandons or loses more than five opportunities in one week, send a sales territory forecast and phone log activity report to the sales manager.
- Save time generating reports by enabling a Crystal Report auto-fulfillment request system, which enables the system to generate and return business reports via email when an employee has submitted a request.

### Improve Customer & Prospect Communications Dramatically

- Respond quickly and create greater customer satisfaction by monitoring incoming emails to generic email addresses, such as sales@, customerservice@ and others to ensure that no inquiry goes unanswered.
- With the Email Response System, simply apply rules based on message content or sender and take action to respond immediately. Monitor incoming email messages, identify the customer's record in Maximizer Enterprise, route the email to the appropriate account manager and append it to the customer's record. Even create a customer service case based on message content to save time and reduce data entry errors.
- Remove names automatically from your email campaign lists when a prospect or customer has indicated they wish to opt-out or unsubscribe to comply with anti-spam legislation.
- Automatically schedule tasks, phone calls or appointments in Maximizer Enterprise based on details of an incoming email message, such as a customer complaint or a product quote request.
- Send an automatic response to email inquiries based on the message content to set the right expectations. For example, automatically create a customer service case when an email is received and send receipt confirmation with case number back to the sender.



## Actionable Intelligence Gives Unprecedented Accountability

The power of Workflow Automation is demonstrated in this lead management process example: tasks that were previously manually handled are automated, and monitoring the process ensures that no step is missed, ensuring staff is accountable for taking action. In this example:

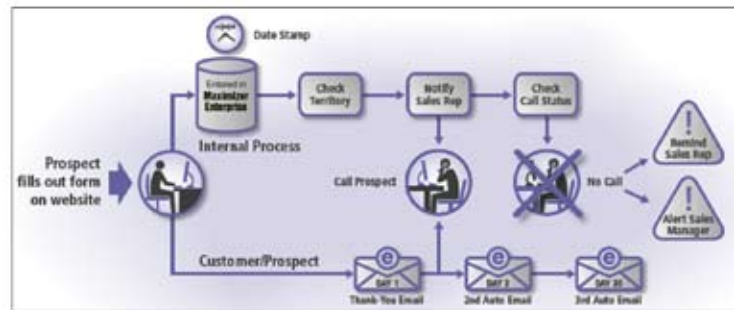
- 1) A web visitor completes a form on your website to get further information from you. The contact details and any other information you want to gather is entered into Maximizer Enterprise and stamped with the day's date.
- 2) Workflow Automation checks the territory and assigns it to the appropriate sales representative and notifies him/her with a task alert, so they can place a follow-up call.
- 3) At the same time, based on the information the web visitor inputted into the form, he/she is placed into a one-on-one follow-up campaign. For example, if they are in Industry A, or are interested in Product B, they would receive personalized messages specific to their situation.
- 4) If after your defined timeframe, the sales rep has not followed up, an email alert can be sent back to that sales rep as well as the sales manager, to ensure that lead is followed and qualified immediately.

## System Requirements

Action Plans are available out-of-the-box for all Maximizer Enterprise users.

Workflow Automation, powered by KnowledgeSync, is a server-driven application which performs all tasks including checking applications for triggered events, sending out alert messages and generating reports.

- Operating System: Microsoft Windows NT, 2000, XP, 2003
- Memory: 128 MB of RAM
- Processor: Pentium 290 (or higher)
- Hard disk space: 200 MB
- 5 kb maximum per event, including event, query, subscribers and all message text



**Automation & Alerts:** Get unprecedented follow-up and accountability with your leads.

Workflow Automation applied to this process saves time, lets you respond to prospects faster than your competition, enables personalized follow-up and ensures no lead slips through the cracks. This can be applied to other unique processes in your business to help you gain a competitive advantage.

## Monitor Business Systems to Ensure 100% Uptime

- Configure Workflow Automation to monitor critical business applications 24 hours a day, 7 days a week to ensure systems are up and running.

Examples:

- ✓ If a system goes down, alert your network administrator's pager.
- ✓ Monitor disk space, network availability, any part of your system that is quantifiable and critical— deal with issues before they create problems.

## Workflow Automaton Suite Comparison

Monitoring	Corporate	Basic	Lite
# of Active Events	Unlimited	Unlimited	6
	Maximizer Enterprise + Email Response System	Maximizer Enterprise	Maximizer Enterprise
Complex Queries <sup>2</sup>	✓	✓	✓
<b>Response</b>			
Crystal Reports (email or save to disk)	✓	✓	
Email Text Alerts	✓	✓	✓
Email (.html) Alerts	✓	✓	
Pager notifications	✓	✓	
Faxes (includes Fax Driver)	✓	✓	
FTP (copy files to an FTP server)	✓	✓	
Run other programs (integrate with back office applications)	✓	✓	✓
ODBC Triggers (integrate with back office applications)	✓	✓	✓
VBScript (Advanced integration with back office)	✓	✓	

<sup>1</sup> Workflow Automation powered by knowledgeSync is an add-on product with additional license fees

<sup>2</sup> The ability to configure an event to use multiple queries, the ability to make one event dependent on one or more other events, the ability to have one event "call" one or more other events, or the ability to trigger an event based on a change made to a database field





## For More Information

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## 9 Reasons that Make Maximizer Enterprise Better

- Award-winning, intuitive, integrated sales, marketing, customer service & support CRM software
- Adaptable to your business demands
- On demand access: Desktop, PDA & Web-Ready
- Rapid deployment & results
- Works with Office, Outlook®, and accounting programs
- Bullet-proof security
- Architecture built on industry standards
- Affordable: Lowest total cost of ownership in its class
- Proven with over 7,500 customers and over 10 years focused on customer management software

### Maximizer Enterprise 9.5

Designed for small and medium-sized businesses, Maximizer Enterprise 9.5 rapidly helps companies gain strategic insights and implement winning strategies that will outperform competitors. This proven, affordable CRM solution gives sales, marketing and service professionals the tools they need to attract prospects, win new customers and increase repeat business.

### About Maximizer Software

Maximizer Software has helped over 7,500 Maximizer Enterprise customers and more than one million Maximizer users grow their businesses by building profitable customer relationships with award-winning solutions.

For more on Maximizer Enterprise 9.5, go to [www.maximizer.com](http://www.maximizer.com) for access to:

- More product details
- Online demonstrations
- Live webinars
- CRM best practices white papers
- 30-day trial software
- Pre-recorded webcasts
- System requirements

Maximizer Enterprise works with technology from the following partners



### Awards



Certified Solution Provider



**Maximizer™**  
The CRM Company [www.maximizer.com](http://www.maximizer.com)

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