Maximizer™ CRM10

For Sales

Maximizer CRM helps sales managers, teams and individual contributors to collaborate, accessing and sharing 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 desktop, web and PDA 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

Respond on-the-fly to maximize your wins.

In a customer-driven market, sales executives and frontline sales professionals are challenged to meet and exceed revenue targets. And it's not merely a matter of winning more deals today—but of building profitable relationships for the long-term. Maximizer™ CRM 10 helps your team to work together more effectively, maximizing competitive strength and consistently making a positive impact with prospects and customers.

Maximizer CRM is simple, accessible, and adaptable CRM that empowers sales teams with access to complete customer information—no matter where or how they work. Combined with a powerful opportunity management system, managers easily track performance and accurately forecast sales—to maximize revenue and maximize every single day.

Build rewarding relationships with a complete view of data

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

With every customer's entire profile and interaction history at your fingertips—including proposals, orders, project specs and phone calls—respond with the kind of intimacy and precision that earns repeat business.

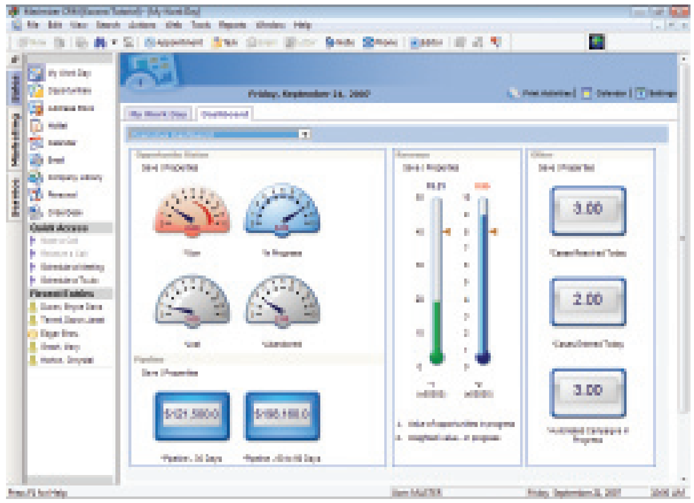
- Enter and retrieve new leads and contacts from the desktop client, through web access, on your handheld or smart phone device (Windows Mobile®, BlackBerry®, or Palm® device).
- View, sort and store unlimited customer information such as product history, deal-critical stats and records of past interactions.
- Implement sophisticated sales methodologies or straightforward action plans, and apply industry-specific templates to common processes.
- Manage territories effectively, assign accounts and leads to the right rep immediately so that every prospect and customer receives a prompt reply.
- Understand prospects better by keeping track of key decision-makers and other influencers with an interactive drag & drop organizational chart.
- Cross and up-sell more effectively by knowing exactly which promotions your customers have received, and which service issues are outstanding.
- Personalize each rep's workspace to present the day's priority tasks, appointments and progress reports.
- Easily manage multiple tasks and meetings with non-Maximizer users with two-way synchronization to Microsoft® Outlook® and Exchange calendars and tasks. Then, extend by synchronizing to handheld devices[i].
- Extend Outlook to your CRM interface by saving contacts and emails to Maximizer CRM.

"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

Monitor productivity and accurately forecast sales

See a high-level, real-time visual snapshot of the company's performance (including the value of opportunities in progress and number of abandoned or won deals) for actionable insight, and leverage detailed reports to gain further clarity as to which tactics work most effectively.



Sales visibility with Maximizer CRM: *Monitor productivity and forecast sales to more effectively manage your team and your business.*

- Begin each day with a management dashboard to get a visual health check on opportunities, leads, cases and account status.
- Keep salespeople where they belong—out in the field, selling, rather that generating reports. Out-of-the-box performance tracking identifies areas for improvement, featuring a variety of customer, lead and opportunity views that can be exported to Excel® for detailed analysis.
- Get real-time updates on daily, weekly or monthly metrics with over 175 standard reports including sales forecasts, account activities and phone logs, segmented by account manager, sales team leader, month or quarter. Automatically email or trigger reports and alerts based on critical performance indicators (when deals are suspended, lost or delayed in closing).[ii]
- Track and monitor productivity through the collaborative business calendar, phone logs and notes that track and time appointments and conversations by product and category, so you see how productive reps are spending their time.
- Effectively manage territories, reassigning accounts when teams change, automatically routing leads and accounts based on territory rules.
- Identify projected revenue by calculating success factors and decision-maker ratings rather than the anecdotal guesswork of sales reps.

Follow through with every lead

Ensure that no lead slips through the cracks. Automatically identify leads that haven't been followed up on, and track the status and source of each lead to measure funnel and conversion rate.

- Automate everyday tasks, catch critical time-sensitive issues and stay on top of priority opportunities with Workflow Automation powered by KnowledgeSync[iii].
- Automatically alert the right people to unpursued leads for follow-up.
- Import lead lists from virtually any file format for follow-up. Create targeted customer lists for outbound call campaigns.
- Increase lead response time by monitoring and responding to incoming emails[iv]. Intelligently route leads and inquiries to the appropriate rep, while responding immediately to the sender and recording the interaction in the customer's record.

Collaborate and Access from Anywhere

Share information—including calendars, sales opportunities and customer emails—with other members of your sales team, wherever they are.

- Track and manage deals from lead to close in any currency.
- Incorporate your sales methodology and processes into Maximizer CRM to increase your win ratio. Track unique steps and activities for multiple products and target markets, step-by-step. Rate success factors, influencers and decision-makers to assess probability of close.
- Keep straightforward deals moving forward with action plans that assign a series of tasks that promote closing, with automatic alerts to stay on track.
- As teams change, reassign multiple accounts, leads and tasks quickly.

Increase productivity with one-stop customer communications

Help sales reps to maximize selling time and minimize time spent on menial tasks, consolidating everything into one convenient, action-oriented workspace.

- Choose from web access, remote synchronization, or PDA access on BlackBerry, Windows Mobile or Palm Devices.
- Easily access Microsoft Outlook inside Maximizer CRM, storing all communications with each account record—including emails sent and received through Outlook—with one-click access.
- Use Word for letters and quotes in customer records, FrontPage for HTML email campaigns (merge any database field to personalize content) and Excel for importing and exporting data.
- Email customers the latest price lists, datasheets and brochures, accessed through a central document repository.
- Improve response quality by sharing templates of effective sales letters, to be personalized and used for campaigns or individual customers.
- Before calling into a priority account or prospect, check the status of outstanding service cases and know which issues are on the table.
- Redirect post-sales technical, late shipment and billing issues to customer support, shipping or accounting to ensure quick resolution.

On-Demand Sales & Professional Coaching

In today's fast-paced, information hungry workforce, your staff needs the right information at the right time. Tips on how to negotiate a deal, advice on time management, or guidance on team leadership—the world's foremost motivational speakers in sales and professional development are now at your fingertips.

- Through CanDoGo™ , get instant access to sales & business know-how to equip teams to succeed in areas including: overcoming objections, creating winning proposals and presentations, teamwork skills, effective communication, leadership, and more.
- Authors and experts include Zig Ziglar, Brian Tracy, Stephen Covey, Tony Parinello, Tom Hopkins, Denis Waitley + dozens more.
- In-context, relevant knowledge in text, audio, video through Maximizer, Outlook, or online.

Empower partners with the right information to drive channel sales

Automatically send leads and opportunity details to partners via secure, customizable, web-based Partner Access, encouraging rapid response from resellers, agents and distributors.

- View the partner pipeline in real-time to develop a more accurate and complete sales forecast.
- Gain greater visibility into partners' relationships with end-users. Gather valuable information from the field (such as why deals are won or lost) and modify sales and marketing efforts to improve win ratios.
- Give resellers the information and tools they need to sell more effectively, from strategic announcements to partner marketing materials.
- Help resellers resolve customer issues with access to a central knowledge base featuring FAQs, product information and alerts.

Maximizer CRM 10 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: Windows desktop, web, mobile devices, remote synchronization

Technology Partners

Certified Solution Provider

Check credit limits, create quotes faster with accounting integration

Service customers faster with Accounting Link available for both Microsoft Dynamics™ GP (formerly Great Plains), and Intuit® QuickBooks®[v]. Quickly and easily see up-to-date information on credit limits and balances, past quotes and invoices directly in a single customer record.

- Create and manage estimates and orders directly from Maximizer CRM.
- Customize integration with leading accounting programs other than QuickBooks, to create a one-stop shop of customer data[vi].

Get Maximizer CRM today and get Simply Successful CRM

i. Synchronization with Exchange Server requires MaxSync add-on product with additional license fees.
ii. Requires Workflow Automation add-on product with additional license fees.
iii. Workflow Automation is an add-on product with additional license fees.
iv. Requires Workflow Automation add-on product with additional license fees.
v. CanDoGo access available with additional subscription directly through Maximizer Software; one-click access through Maximizer CRM will be available in the future.
vi. Accounting Link is an add-on product with additional license fees.
vii. Integration with other ERP and accounting programs requires Customization Suite add-on product.

Why Maximizer CRM 10

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

Visit www.maximizer.com for:

- Information based on your role: sales, marketing, service, executive, IT
- Information on features and technology
- Online demonstrations, trial software
- White papers on CRM best practices
- Webinars

Maximizer CRM helps small and medium-sized businesses maximize revenue, maximize satisfaction, and maximize every single day.

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Maximizer Software
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