



Process Automation and Business Monitoring

Maximizer CRM is an integrated CRM Suite that delivers decision-making confidence across Sales, Marketing and Customer Service. Whether using Action Plans or combined with KnowledgeSync-powered workflow automation, Maximizer CRM makes front line success more repeatable.

- Automate repeatable step-by-step processes and improve productivity
- Identify tasks that require immediate or overdue attention
- Provide everyone with the up-to-date notifications necessary to work smarter

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

While the competition struggles with manual processes, queries, and reports on customer interactions, gain a competitive advantage by automating your critical business processes.

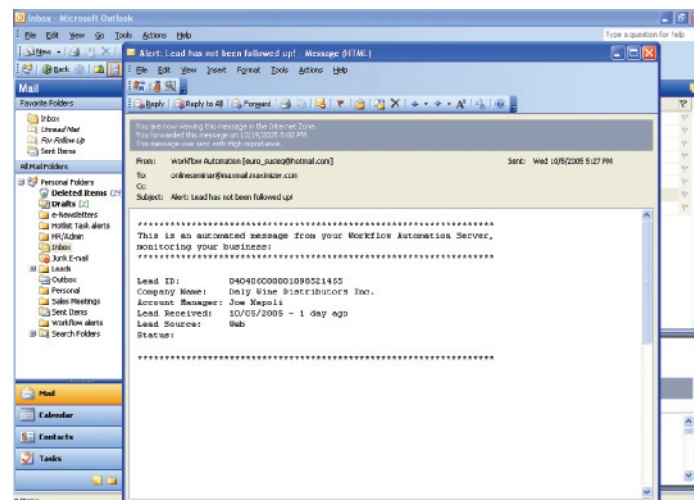
Action Plans and Workflow Automation, powered by KnowledgeSync, work together to streamline processes and reduce manual work for frontline staff.

Action Plans route tasks to the right people based on milestone events, inspiring time-sensitive action on behalf of customers and prospects. Flexible and easy to configure for business users, create any number of step-by-step repeatable tasks to support business processes to guide sales processes, marketing projects or service incidents.

Meanwhile, Workflow Automation is an engine run by IT in the background, to assure critical tasks are completed automatically based on other actions in the database —such as assigning web leads or notifying staff of service escalations—to make sure that relationship-building care and communication never falls through the cracks.

Be notified immediately and act quickly to critical customer issues

When staff receive action-oriented alerts via email, PDA or phone, they can respond to time-sensitive milestones or new developments no matter where they are. Workflow Automation comes complete with over 90 pre-configured queries and 50 events (actions) to help you monitor sales, marketing and service processes as well as those from other systems (such as accounting or inventory systems) for greater visibility and accountability. See just a few examples on the next page.



Automatic business monitoring:
Get email notifications to know immediately when a process or rule is broken.

Use the following pre-configured queries and events immediately with Maximizer CRM to monitor your business and automate processes.

Lead Management

Notify sales or account managers when the following processes are broken:

- Lead not assigned
- Lead not contacted after X days
- Lead with no follow-up task created
- Lead with no status update after X days
- Hot lead with no associated sales opportunity
- Sales Representative has created fewer or more than X leads in Y days

Account and Sales Opportunity Management

Alert the sales or account managers when the following updates occur with sales opportunities.

- Accounts are not assigned to a territory or account manager
- Sales opportunity is updated with Lost/Abandoned/Suspended with no "Reason"
- Closed today, actual revenue < 50% of forecast; or > 125% of forecast
- More than X sales opportunities in progress with one prospect/customer
- More than X lost or abandoned by any rep within Y days
- Due to close this week, probability > 75%
- Forecast revenue or probability of closed is changed
- Opportunities won, lost, suspended, or due to close today
- More than 14 days overdue for closing
- Sales opportunities open for more than 90 days

Quote and Order Management

Monitor the quotes being generated and sent to prospects, and the orders being booked, by sending notifications of the following actions to management.

- Quotes over \$X created, updated as inactive, or expiring in X days
- Account Manager with fewer or more than X quotes in the last Y days
- Orders over \$X booked
- When more than or less than \$X worth of orders is created in the last Y days
- Orders older than Y days not yet shipped
- Orders over \$X cancelled

Customer Service Case Management

Alert the customer service manager or other staff member when the following incidents occur related to customer service cases.

- 10 or more open cases per assigned staff person
- Case priority or status is changed
- Case resolved, or not resolved today
- Follow-up date is today or tomorrow
- More than X open customer service cases with priority "high"
- More than X unassigned customer service cases
- Customer service case open for more than a week

And automate the following:

- Create Case based on incoming email

Marketing Campaign Management

Notify the marketing manager when the following updates occur with marketing campaigns.

- Campaigns with more or fewer than X sales opportunities associated with it in the last Y days
- Campaigns with more or less than X\$ worth of sales opportunities associated with it in the last Y days
- Marketing budget is changed
- Completing this month
- Forecast revenue is changed
- Actual revenue is < 65%
- Campaign Activity is suspended

Automate list management to ensure compliance with anti-spam legislation and clean lists for your next targeted marketing campaign.

- Remove bounced emails from campaigns
- Remove “unsubscribe” requests (email) from campaigns

Staff/Performance Management

Ensure consistent data is entered into Maximizer CRM, and that staff are following process guidelines.

- Receive exception reports on anything you want to monitor with your data and customer interactions, such as notifications when employees enter inconsistent data (missing contact information, unauthorized discounts).
- Send reminders to remote staff who haven't synchronized with the main system for X days.
- Be notified when there are more than X overdue tasks, or overdue for more than Y days for any staff person

Knowledge Base

Monitor the articles that are being distributed through the Knowledge Base by being notified when the following actions occur.

- Draft Knowledge Base Article created
- Knowledge Base Article older than X days with status of “Draft”
- Knowledge Base Article published
- Knowledge Base Article expired
- Draft Knowledge Base Article used a resolution to a Customer Service Case

Capture and distribute business insight on a regular basis

- Generate and distribute reports automatically. For example, schedule sales forecast reports to senior executives every Monday morning.
- Generate and distribute reports when a certain action within Maximizer CRM 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.

Improve customer & prospect communications

- Monitor incoming emails to company email addresses (such as sales@, customerservice@), route to the assigned staff person, create a task or service case and ensure no inquiry goes unanswered .
- Comply with anti-spam legislation with automatic opt-out linked to Maximizer CRM.
- Send an automatic response to email inquiries based on assigned service case or other detail to set the right customer expectations.

i. Action Plans are included with all Maximizer CRM Editions; Workflow Automation powered by KnowledgeSync is an add-on product with additional license fees.

ii. Requires Email Response System module of Workflow Automation.

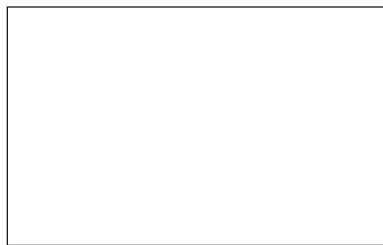
Maximizer CRM 10 Features

- 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

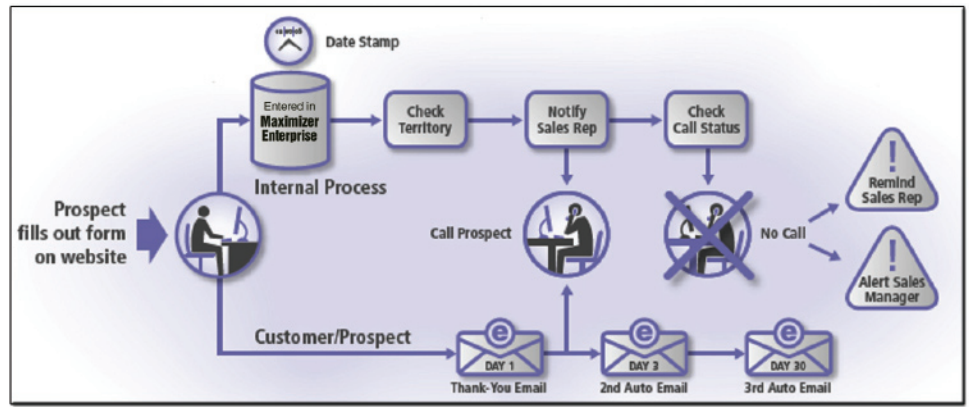
Technology Partners



Certified Solution Provider



Automating lead accountability: a typical scenario



With Workflow Automation, lead management tasks that used to be handled manually are automated and monitored to ensure that no step is missed. For example:

- 1) A web visitor completes a form on your website requesting further information. Contact details are entered into Maximizer CRM and stamped with the day's date.
- 2) Workflow Automation checks the territory and assigns it to the appropriate sales representative, notifying with a task alert for a follow-up call.
- 3) At the same time, based on the information the prospect entered into the form, they are placed into a one-on-one follow-up campaign to receive personalized messages specific to the product they'd shown interest in.
- 4) If the sales rep has not followed up in a timely manner, an email alert is sent back to them and the sales manager to ensure immediate follow-up.

In this scenario, Workflow Automation saved time, prompted faster response than the competition, and enabled personalized follow-up—all adding up to competitive advantage.

Get Maximizer CRM today and get Simply Successful CRM

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.

Call: 1-800-804-6299

Email: sales@maximizer.com

Web: www.maximizer.com

Americas

604-601-8000 phone
604-601-8001 fax
info@maximizer.com
www.maximizer.com

Europe, Middle East, Africa

+44 (0) 1628 587777 phone
+44 (0) 1628 587778 fax
info@max.co.uk
www.max.co.uk

Australia, New Zealand

+61 (0) 2 9957 2011 phone
+61 (0) 2 9957 2711 fax
info@maximizer.com.au
www.maximizer.com.au

Asia

+(852) 2598 2888 phone
+(852) 2598 2000 fax
info@maximizer.com.hk
www.maximizer.com.hk

Maximizer Software
Simply Successful CRM