

# MAXIMIZER CRM OVERVIEW



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# Maximizer CRM Overview

Maximizer is an all one-in-one CRM solution, designed to help you manage your customers from acquisition through to retention and expansion. Maximizer is easy to setup, simple to use and comes with unlimited support from our CRM experts - all for a predictable cost.



In an ever increasingly competitive marketplace, predictable growth is essential to the success of any business. Maximizer is a CRM solution designed to help you grow with confidence by using tools to streamline your processes, so your marketing and sales teams can focus on nurturing your most profitable relationships.

## SEAMLESS INTEGRATION BETWEEN MARKETING AUTOMATION AND CRM

Marketing is the first touchpoint for a new prospect but when your marketing automation platform and CRM aren't integrated it results in a disjointed customer journey from the start. Maximizer has free and easy to install integrations with key marketing automation platforms including HubSpot, Marketo and Mailchimp so you don't have to worry about lead transfer between platforms. Marketing can pull accurate reporting, and sales have all the information they need before talking to a new prospect.

## STREAMLINE YOUR LEAD MANAGEMENT

Sales is a complex activity, some leads are hot prospects while others can clutter your database with irrelevant data. The leads module in Maximizer has been specifically designed to bring clarity to your sales processes with a clean, easy-to-use workspace that helps you sort your leads from hot prospects to existing customers without impacting the quality of your existing customer database.

## FULL VISIBILITY OF OPPORTUNITIES

The opportunities module in Maximizer provides visibility into your pipeline for complete control over the sales process. The opportunities module can be completely customized to your own business processes and visual dashboards provide easy to read snapshots into how your sales team is performing.

## NATIVE MOBILE APP TAILORED FOR SALES

Never miss a beat with our native mobile app for sales. Designed to give your teams out in the field all the features and functionality of the opportunities module in the palm of their hand. Plus, with features like voice notes they'll save time too!



Customer attrition is a challenge affecting many businesses and in competitive industries, service is the difference between keeping and losing a customer. Maximizer is equipped with features and functionality that drive efficiencies for your sales and support teams while improving the customer experience.

### ALL THE CUSTOMER INFORMATION YOU NEED – IN ONE PLACE

Maximizer is setup to give you a single view of your customer in an easy-to-view interface. Automatic audit trails provide a record of every single piece of activity against a customer and the customizable tab allows you to view only the information that is important to you.

### CASE MANAGEMENT

Easily raise resolution tickets, complete with case numbers, product categories, assignments and other details that are fully searchable for quick access. Use alerts and notifications for faster response time and escalation of more serious issues to subject matter experts.

### SERVICE LEVEL INSIGHT

Track team performance across key metrics with pre-built dashboards and customizable reports, and use the intelligence to improve service levels and speed of response over time.



Acquiring new customers isn't the only way to grow your business. Expanding the reach of your products and services within your existing customer base is also a way to generate growth.

### INCREASED CUSTOMER INTIMACY

With our integrations with key business apps and features within Maximizer you can view everything a customer does in and outside of your CRM.

### FULLY CUSTOMIZABLE REPORTING

Maximizer contains reports that can be fully configured to your business. Identify possible upsell and cross sell opportunities in your customer base then quickly and easily display them in a visual dashboard.

## PRODUCTIVITY

When time and resources are constantly being squeezed, anything that drives efficiency while improving accuracy is always welcome. Maximizer is packed with tools and features to drive productivity in your business while improving the customer experience and making your life easier.

## APP DIRECTORY

With the average business using six different applications on any given day, the last thing you need is for them to work in silos. Maximizer's App Directory is packed with free and easy-to-install applications covering everything from marketing automation, accounting, maps, productivity and even text messaging.

## CUSTOMIZABLE TAB

Information is great, but when there is too much data to look at it can hinder your operations. The customer feature tab allows your users to see what they want to see, in a single view.

## POP-UP NOTIFICATIONS

Create pop-up notifications for almost anything, from customer service cases to new leads and closed opportunities to make sure you never miss an important event.

## QUICK SEARCH

When you have thousands of records in your CRM, sometimes you need to go straight to a specific record. Our quick search function allows you to do just that. Search through your leads, opportunities, customer contacts, services cases and more with a variety of data points.

## ELAPSED TIME/DURATION CALCULATION

Automatically calculates elapsed time from a start date. Easily setup to track critical timeframes such as time passed since last contact, contract renewal dates and personal anniversaries. This feature can also be used to automatically update data displayed in dashboards, searches and column views.

## FIVE THINGS THAT MAKE MAXIMIZER DIFFERENT



**1. Easy to Use**  
Easy to configure and easy to adopt.



**2. CRM Expertise**  
Access to live CRM experts, not chat bots.



**3. Custom Workflows**  
Workflows tailored to the way you work.



**4. Integrations**  
Enhanced visibility and efficiency.



**5. Predictable Cost**  
All-inclusive license at one predictable cost.



“Since 1987, more than **1 million users** and over **120,000 companies** have trusted us to help boost the bottom line”

*Vivek Thomas, President*

## ABOUT MAXIMIZER

We make enabling your success our top priority. That’s why we’re committed to helping each of our customers achieve outstanding results. With top-rated tools for contact management, lead management and customer service, Maximizer CRM gives businesses everything they need to grow – all in one place. Today, Maximizer is a global company with offices in five countries plus an international network of Certified Solution Providers. We constantly innovate to ensure our customers can become more successful.

Time and time again, our customers tell us that our exceptional service sets us apart as a market leader in CRM. And that feedback keeps us focused on making planning, selling and management ever easier – to help our customers get rapid results.

Grow with Confidence. Grow with Maximizer.



#GrowWithConfidence

### AMERICAS (HEAD OFFICE)

**Maximizer Services Inc.**  
**Sales** +1 800 804 6299  
**Phone** +1 604 601 8000  
**Email** info@maximizer.com  
**Website** www.maximizer.com

### EUROPE / MIDDLE EAST / AFRICA

**Maximizer Software Ltd.**  
**Phone** +44 (0)1344 766 900  
**Email** enquiries@maximizer.com  
**Website** www.maximizer.com/uk

### AUSTRALIA / NEW ZEALAND

**Maximizer Software Solutions Pty.**  
**Phone** +61 (0)299 572 011  
**Email** info.anz@maximizer.com  
**Website** www.maximizer.com/au

[WWW.MAXIMIZER.COM](http://WWW.MAXIMIZER.COM)