CRM for Sales

Increase productivity and sales effectiveness to optimise opportunities and drive revenue

From quote to close, sales executives and frontline sales professionals face the challenge of higher customer and prospect demands, greater competition and economic uncertainties. Gain the edge over your competitors and equip your team with an impactful sales force automation solution that provides unparalleled access to critical customer information and performance insight - when and wherever you need it - at your desk, from home, or while on the road.

Optimise sales performance, build your sales pipeline, improve forecast accuracy, and empower your staff to develop the customer relationships that ensure sales success. Maximizer CRM is the one-stop CRM solution that lets you stay focused on the revenue generating activities and opportunities that will drive your business forward.

Gain real-time insight into your sales pipeline and performance

Business Intelligence with Dashboards and Reports

Gain sales insight quickly and simply with a complete history of customers, prospects and leads from just one place – through multiple access options: Windows desktop, a web browser or on mobile devices such as smartphones or tablets.

Stay on top of productivity and sales levels with real-time visual snapshots of company and team performance. Maximizer CRM's easily configured dashboards and customisable reports provide you with real-time feedback to adjust tactics or resources on-the-fly. Maximise your wins by forecasting accurately, following deal progress and driving your team to move opportunities through the sales pipeline.

- Gain actionable insight by starting each day checking your management dashboard for a visual health check on sales leads, opportunities, service cases and account status
- Set up wizard-driven dashboards, formatted with your choice of indicator style, displaying the key performance indicators (KPIs) that matter to you, in real-time
- Enhance your insight further by clicking on the dashboard indicator to drill down to view the details behind the metrics
- Spend more time 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
- Personalise each rep's workspace to show the day's priority tasks, appointments and progress on their own sales targets
- Automatically trigger reports with Sales Opportunity Monitoring, emailed to you, or your team members, based on a critical thresholds of activity, inactivity on leads or changes of status.

Key Benefits

- Gain real visibility into sales performance to guide your team
- Maximize sales productivity with the tools you 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
- Integrate with Microsoft Office® and Outlook®.

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 repeated custom - in order to stand out from the competition. Maximizer CRM empowers your sales representatives 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 their interaction history is tracked

Maximizer™ Simply Successful CRM

"Through Maximizer CRM, the team is able to target users at the relevant time, increasing sales revenues."

Richard Harris, Managing Director, Lely Ireland

Use out-of-the-box and custom reporting to forecast your sales pipeline with confidence and build your own custom key performance indicators to gain instant insight into what matters to your business.

in detail in Maximizer CRM, including quotes, orders, project details, emails and calls. You and your staff are equipped with the necessary information for engaging customers, earning loyalty and driving repeat business.

- Profile companies and contacts, using your choice of custom user-defined fields, such as lead source, industry, company size, products of interest, and personal preferences to track customers and prospects in a manner that best suits your business
- Work seamlessly with Microsoft Office and Outlook, now with links to SharePoint® documents
- Integrate with other internal systems such as Asset tracking or ERP software
- Access a complete 360-degree history of customer interactions and activity including emails, calls, notes, product purchases and deal-critical indicators including which email marketing campaigns they've received and recent service tickets created
- Personalise the way you view information with customisable column views, searches and data sorting
- Create custom data entry windows for different teams that provide key fields relevant to each group
- Maintain data integrity with duplicate record checking and mandatory fields
- Search on any number of fields 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 directions for virtually any location in the world using the built-in Google Maps™ or Microsoft Bing™.

Efficiently pursue leads and improve productivity with fully integrated communications

Stay focused on maximising revenue by consolidating customer and prospect interactions in one centralised location. Facilitate convenience and ease of use with integration of Maximizer CRM with Microsoft Office and Outlook.

Email Templates

- Use merge fields to maximise your productivity by quickly sending personalised, tailored messages to a number of customer records or to a saved list
- Create your own email templates to use for prospecting, follow-up, welcoming new customers or any other activity
- Save messages to customer or prospect record automatically for future reference.

Microsoft Office and Outlook integration

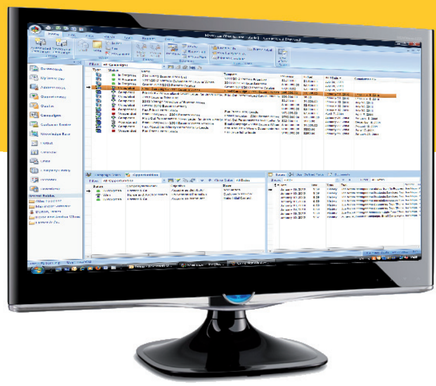
- Easy one-click access to Outlook within Maximizer stores emails sent and received through Outlook to each contact record
- Maintain consistency across all communications with letter, email, quote and fax templates in Microsoft Word®, FrontPage® or Excel® formats.

Optimise revenue generation by tracking progress toward targets

Sales Quota Management

Powerful tools, reports and visual dashboards in Maximimizer CRM empower sales leaders and their teams to stay focused on generating revenue and to be held accountable for their results.

- Stay updated on team, territory and individual performance, ensuring accountability and the required level of motivation within your sales organisation
- Create powerful quota-based dashboard indicators for results at-a-glance
- View exactly what you need to see by filtering annually, quarterly and monthly, based on your company's fiscal year
- Share results through email, printed reports or quick, one-click export to Microsoft Excel
- Manage administrative rights to create, view or modify quotas among team members.



Monitor opportunities and sales metrics to effectively manage and trigger next steps seamlessly.

Convert leads to solid sales opportunities

Lead Management

The ongoing challenge of converting leads to customers is more easily achieved with the right process in place for efficient lead qualification, follow-up and nurturing. Capitalise 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
- Automatically assign leads and accounts based on territory rules ensuring that high potential opportunities flow to the appropriate teams and representatives
- Qualify leads efficiently by setting up fields to capture qualification criteria including budget, purchase timeline, need, prospects' authority level and more
- Drive more sales through channel partners with Partner Relationship Management lead assignment and forecasting
- Automate everyday tasks, catch critical time-sensitive issues and stay on top of priority opportunities. with email alerts to your inbox, using Workflow Automation[1]
- Import lead lists from many file formats
- Create targeted customer lists for outbound call campaigns by filtering for specific criteria
- Keep complete communication records with call tracking and notes
- Alert the right people automatically[1] regarding leads that have not been followed-up in a timely manner
- Use Conditional Color Highlighting to rate the quality of leads and stay focused on those with the greatest potential
- Increase lead response time by monitoring and responding to incoming emails with intelligent routing[1] to the appropriate rep, while responding immediately to the sender and recording the interaction in the customer's record.

Clinch top deals and keep priority customers satisfied

Sales Opportunity Management

Implement your sales methodologies and have every sales person follow the same best practices in step-by-step activities to increase close ratios and maximise wins. Then use advanced sales tracking to closely monitor deals, improve performance and forecast sales with ease.

- Use Sales Opportunities to track every qualified lead from early discussions through to final 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
- Track all details and monitor the stages of deals, including key decision-makers and products being pitched and sales strategy
- Create graphical sales reports, including your sales pipeline funnel, to forecast sales, monitor your pipeline and analyse win/loss results.

Sales Opportunity Monitoring & Alerts

- Increase visibility into your team's activity and performance
- Keep tabs on your biggest deals and most valued customers by staying alerted to important changes in their status
- Apply sophisticated, custom methodologies to better manage unique opportunities or take advantage of simple Action Plans and built-in templates that keep straightforward deals moving ahead
- Determine what changes you need to be aware of and configure email notifications to be sent automatically whenever an opportunity has been modified
- Facilitate timely response and collaboration by keeping account managers and products up-to-date so they can take effective action.

Order Management

Whether you take orders online or over the phone, you can manage your opportunities more effectively by integrating your quote and order

1. Requires Workflow Automation, powered by KnowedgeSync, an add-on product with additional license fees.

Maximizer™ Simply Successful CRM

"When on the road, my sales team can access information recorded by the offices and respond instantly to an opportunity."

Steve Davidson, Managing Director, Minus 40

Keep on target and on top of sales force management, by accessing Maximizer CRM on your mobile device.

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 enquiries, create time-limited quotes, apply discounts and convert them into orders
- Merge quotes into Word templates to further customise communications
- Track quote and order status, response and fulfillment through to shipping and payment
- Automatically email customers with order summaries to manage expectations.

Social Networking

Build dynamic social profiles of customers and high value prospects by linking directly to relevant social networks and a contact's LinkedIn[2] profile.

LinkedIn Integration

- Prospect and generate new leads with the ability to search, view and link directly to a contact's or company's LinkedIn[2] profile from Maximizer
- Enhance the level of customer engagement with access to a contact's LinkedIn[2] profile and shared connections within a company
- Determine key contacts within a company to home in on those with the greatest influence in the purchase decision
- Improve customer service and build customer loyalty with an additional channel of communication.

Social Profile Building

- Build complete customer and prospect profiles by capturing links to all relevant social networks in one place
- Obtain up-to-date information on your contacts with direct links to external websites and social media profiles (blogs, Twitter®, Facebook®, LinkedIn).

Maximizer Mobile CRM

Accessing Maximizer CRM via your smartphone or tablet keeps you on top of your deals with complete access to the critical customer and prospect information essential to achieving success. Maximizer's mobile CRM app allows you to use a vast range of the latest mobile devices, including iPhone®, iPad®, BlackBerry®, Windows Mobile®, Android®, Samsung® and many more, to build loyal customer relationships and win more deals.

- Increase user adoption and decrease data entry errors using the familiar user interface that optimises the latest technology
- Get real-time online access to entire Maximizer CRM database content
- Look-up and update accounts, contacts and leads, including custom fields and notes for a complete history of interactions
- View available time and schedule appointments with multiple colleagues in just a few clicks
- Stay on schedule and on task with email notifications and alerts
- Get instant views of real-time business insights with dashboards for effective and rapid decision-making anywhere, anytime
- Access and update details of sales opportunities to keep deals moving and forecasts accurate
- Access the online document library to send brochures, quotes and other documents to customers and prospects on-the-fly
- Log calls, SMS text messages and emails to customer records and eliminate the need to update records back at the office
- Plan your optimal day of appointments and activities by mapping directions to multiple customers on your mobile device.

2. Requires Premium LinkedIn account

About Maximizer Software

Maximizer Software delivers Customer Relationship Management (CRM) software and professional services to meet the needs, budgets and access requirements of entrepreneurs, small and medium businesses and divisions of large enterprises.

Simple, easy to use and affordable, Maximizer CRM enables companies to mobilise their workforces through all-access web, smart phone, tablet and desktop delivery methods.
Easily configurable for organisations in any industry, Maximizer CRM optimises sales processes, enhances marketing initiatives and improves customer service to ultimately boost productivity and revenue.

With headquarters in Canada and offices and business partners worldwide, Maximizer Software has sold over one million licenses to more than 120,000 customers since 1987.

Technology Partners

Powered by Windows Azure · Microsoft GOLD CERTIFIED Partner · SAP BusinessObjects · BlackBerry Alliance Member · Bell · Vineyardsoft

Maximizer CRM

Maximizer CRM helps small and medium-sized businesses maximize their marketing, sales, customer satisfaction capabilities and enhance their productivity and efficiency through the optimisation of what resources they have.

Why Maximizer CRM?

- Simple & quick to deploy, use and maintain
- Flexible access options through web, desktop and mobile devices
- Value for money with low total cost of ownership and monthly subscription models
- Expertise as a leader in pioneering CRM development, with more than 20 years experience.

Visit www.max.co.uk for:

- A test drive of the latest release
- Information on how CRM can support your role
- Tools and eBooks
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