



Maximizer CRM Overview

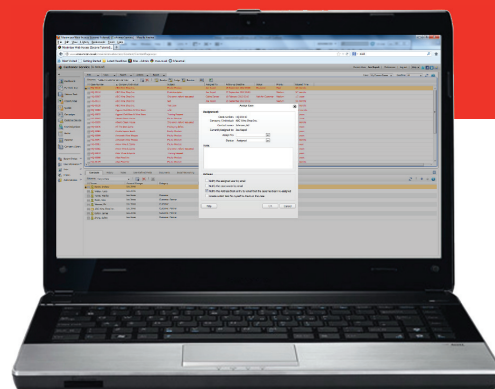
A comprehensive look at Maximizer
Software's latest CRM solutions



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*Inspire ferocious customer loyalty
by effortlessly tracking, escalating,
resolving and reassigning support
cases to provide a pre-eminent
customer experience.*



About Maximizer

Good customer relationships are at the heart of business success. As a pioneer in the Customer Relationship Management (CRM) industry for 25 years, Maximizer has been helping businesses increase sales, generate high quality leads and raise productivity and revenues whilst delighting customers.

However, to be successful in today's difficult climate, organisations need to be agile, having the ability to adapt quickly to changing requirements in a cost-effective and productive way.

The latest generation of Maximizer CRM software has the ability to deliver these benefits right across your organisation.

A global organisation, Maximizer has been the SAVVY (Simple, Accessible, Value for money, Visionary, Your choice of deployment) CRM choice for more than 120,000 customers of every organisational size and in every industry across the world. With over 1,000,000 licences sold, the value from Maximizers' simple, accessible and affordable systems is tested and proven.

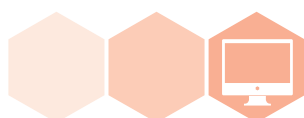
Available in the cloud or on-premise, Maximizer CRM12 provides the flexibility to access your critical corporate and customer information when and where you need it - whether it is from your desk, online or on the move, via mobile devices like smartphones and tablets (e.g. iPad®).

This lets Management, Sales, Marketing and Customer Service staff have rapid, reliable insight and make quick, informed decisions in real time, helping reduce costs, increase sales and improve customer retention.

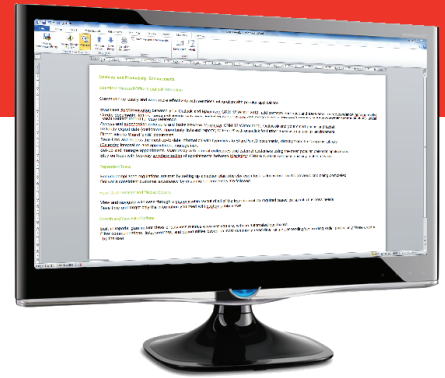
Quick to deploy, learn and use, Maximizer CRM 12 delivers a complete and robust solution, centralising data whilst streamlining business processes. Harnessing this power allows you to rapidly optimise your level of productivity, performance and profitability.

Key Improvements:

- Account and contact management
- Task management and automation
- Sales force automation
- Sales forecasting
- Marketing automation
- Email marketing
- Customer service management
- Business Intelligence
- Microsoft Office® integration
- Outlook® & Exchange® synchronisation
- Workflow automation
- Partner relationship management
- Time management
- Accounting integration & eBusiness
- Deployment: cloud and on-premise
- Access options: Windows desktop, internet Browser, remote synchronisation & Mobile devices such as smartphones and tablets (e.g. iPad®)
- LinkedIn® integration
- HubSpot integration.



*Integrate, completely with
Microsoft applications like
Outlook and Word with
Maximizer CRM 12 Summer
2013.*



Anytime, anywhere, anyhow

Access Maximizer CRM at your desk - online or on the move

A pioneer in mobile CRM since 1995, the latest generation of Maximizer CRM software provides cross device, cross function, multi-platform access through Windows desktop, the Web or mobile device (e.g. BlackBerry®, iPhone®, Windows Mobile®, Android™).

Mobile access also makes Maximizer available via iPad® and other tablets, so you can now view, read, modify and add all the information you would expect from a full CRM. An intuitive, easy to use touch screen, optimised for faster user adoption, removes the need to purchase different applications based on the mobile device and helps increase adoption and decrease inaccurate data.

This choice and flexibility of access options delivers the critical customer insight you need, when you need it, how you need it and where you need it - at your desk, at home or in the field.

Adapting to the way you work, this access versatility means organisations can deliver the quick, relevant and personal response demanded by customers and rapidly adapt to requirements in a productive and cost effective way.

Maximizer CRM for your desktop:

The intuitive interface means

Maximizer Windows desktop is fast and easy to learn, especially for those familiar with the Microsoft Office® suite of products.

Maximizer CRM online:

Log in anywhere, using a secure, standard web browser, to your Maximizer system located on-premise or in the cloud. Maximizer web access presents the same user friendly interface and great functionality as the desktop software.

Mobile CRM:

Offsite regularly, occasionally or just away from your desk? Mobile CRM gives you the ability to manage all aspects of your CRM via your smartphone and mobile devices, providing you with the key to success in today's competitive environment.

Collaboration:

Allow teams to work together effectively by sharing information and documents through a Microsoft SharePoint® portal.

Business intelligence

Interpret crucial metrics, turning data into information, into knowledge.

Make better decisions, faster with real time key performance metrics and reports delivering better understanding and insight into your customers and your business.

- Simple dashboard wizards in Maximizer CRM 12 allows you to get

a big-picture perspective, or a very detailed view, by easily creating and personalising dashboards to display the metrics most relevant to you, your staff and any other relevant personnel given permission

- Share key metrics, save time and improve visibility across the organisation with the ability to email dashboards
- Over 175 standard Customer reports installed with Maximizer, plus save money and time by utilising built-in SQL Server Reporting Services (SSRS).

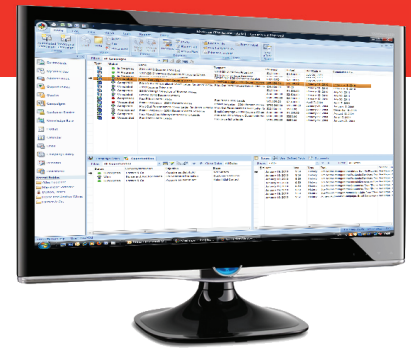
Customer service & support

Resolve issues faster to maximize your customer satisfaction.

Shape your customers' experience by providing your service and support teams with the information and tools to interact and resolve issues quickly and efficiently. Satisfy customers by delivering exactly what they need, when they need it, helping them to become self-sufficient. Leverage new-found customer confidence to cross-sell, up-sell and promote repeat business.

- Automate processes, such as case assignment and notification, to keep you ahead of customer expectations
- Track customer service issues and assign appropriate resources
- Manage the delivery of resources more effectively to drive productivity.
- Enable customer self-service via

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



- secure Web portals
- Access real-time sales and marketing information to support cross-sell and up-sell initiatives
- Link to a central Knowledge Base to resolve issues faster
- Escalate customer service issues to the appropriate specialist and resolve cases more rapidly
- Control service resources through effective tracking of billable hours and rates according to service level agreements
- Deliver personalised communications to customers throughout the sales cycle
- Respond faster and improve call productivity with computer telephony integration (CTI).

Marketing

Create, attract, retain and delight customers, profitably.

Maximizer's built-in marketing tools mean you can simply and effectively plan, budget, execute, analyse and optimise all aspects of marketing, ensuring you spend your marketing budget wisely and directing resources to initiatives that generate proven returns.

Plus, apply the Maximizer CRM: HubSpot Connector¹ and amplify your online marketing efforts with improved lead intelligence, bridging the gap between marketing and the sales pipeline for a shorter sales cycle and greater conversion.

- Use the Maximizer CRM: HubSpot Connector¹ to dramatically improve your inbound marketing
- Create, automate and track effective marketing for personalised, relevant campaigns and messages - HTML or text; email, fax, and print campaigns
- Measure clicks, responses, leads, deals, return on investment (ROI) and revenue
- Send targeted, personalised email campaigns using secure templates, from multiple email addresses
- Real time data for quick and informed decisions
- Import leads directly from your website
- Seamless integration of the marketing and sales functions in Maximizer delivers higher conversion rates and greater customer satisfaction
- Simple to use, easy to customise and access - anywhere, anytime and anyhow, to work the way you do.

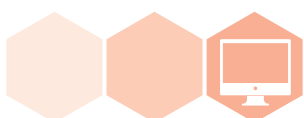
Track and engage online traffic with seamless HubSpot integration¹

The Maximizer CRM: HubSpot Connector is a powerful tool that bridges the gap between Maximizer CRM and sales pipeline management and HubSpot, the all-in-one inbound marketing software. With HubSpot, you can amplify your online marketing efforts, including measuring the effectiveness of your website, develop responsive landing pages, create informative blogs and schedule your social media activities across Twitter®, LinkedIn, Facebook®, Google+®, Pinterest®, Youtube® and Xing®.

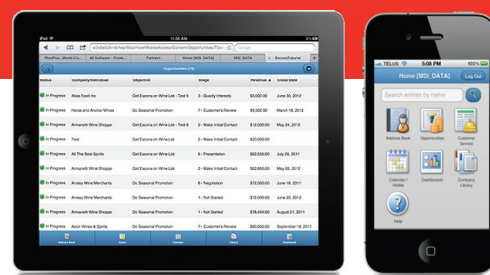
All leads generated will seamlessly flow into your Maximizer CRM, putting HubSpot's lead intelligence and prospect profile information into the hands of the Sales team, thus improving the quality of marketing leads generated, shortening the sales cycle for improved sales conversion and closing the loop between marketing effort and sales revenue.

- Lead Integration: new leads and enquiries captured in HubSpot flow seamlessly to your account managers in Maximizer
- Prospect Intelligence: put HubSpot's rich marketing intelligence into Maximizer, to learn more about every prospect and customer
- Bi-directional Sync: new records that originate in one system (Maximizer or HubSpot) can be instantly passed to the other system
- Closed Loop Reporting: see the connection between your marketing efforts and won opportunities in Maximizer to enhance decision making
- Custom Lead Scoring: control which leads are sent to Maximizer and when, based on any HubSpot activity or criteria, using custom lead scoring
- Customise Contact Profiles: Maximizer basic or customised fields can be mapped to HubSpot to keep contact profiles current and ensure effective segmentation
- Sales Team Notifications: send customer notification emails to sales representatives when leads take key actions on your website for specific

1. Maximizer CRM: HubSpot Connector is an add-on product at extra cost



Access your CRM system via almost any mobile device and benefit from comprehensive CRM functionality on the move.



follow-up

- Track Lead Sources: see which sources are producing customers, down to the keywords they search and individual pages they came from
- Lead Nurturing: use online behaviour tracking to get the ideal email message or sales offer to the right prospect at the right time.

Improve marketing productivity and identify what works

Automatically calculate campaign ROI – instantly see conversion rates, evaluate the cost of customer acquisition and interpret response rates to focus on what's working.

- Set-up automated processes for lead management, such as automatically responding to web enquiries with a series of emails and alerting the appropriate sales representative to follow up. Collect data from web forms directly into Maximizer CRM, including any custom fields
- View campaign response rates at-a-glance to identify which tactics are most successful
- Comply with privacy, do-not-call and anti-spam legislation with out-of-the box, system enforced safeguards
- Keep track of important campaign details and deadlines by assigning step-by-step action plans to team members.

Sales

Attract. Engage. Succeed ...anywhere, anytime

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 (iPhone, BlackBerry, Windows Mobile, or tablets such as the iPad®).

- Increase your win ratio by implementing proven, repeatable best practice sales processes for step-by-step success
- Document and review the entire history of customer activity, account status and financial history to help deliver greater value over time
- Gain actionable insight and adjust strategy accordingly by checking your personalised dashboards for a visual health check of sales leads, opportunities, sales pipeline funnels, sales quotas and account status
- Manage products, quotes and orders. Link sales opportunities to accurately track the entire sales and purchase cycle
- Keep tabs on your biggest deals by staying alerted to important changes in their status.
- Enable sales teams to easily work together more effectively, manage accounts and collaborate on opportunities
- Forecast with confidence using report suites that include sales pipeline, lead summary and opportunity analysis
- Work seamlessly with Microsoft Outlook, Word and Excel, now with links to SharePoint Documents. Integrate with accounting packages and other internal systems such as Asset tracking or Enterprise Resource Planning (ERP) software
- Measure performance and potential - get real time visibility into sales and team performance with out-of-the-box and custom reports
- 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
- Drive more sales through channel partners with Partner Relationship Management lead assignment and forecasting
- Automatically assign leads and accounts based on territory rules ensuring that high potential opportunities flow to the appropriate teams and representatives
- Sales quota management: view of sales targets and individual and team performance.
- Use the Maximizer CRM: HubSpot Connector to receive greater prospect intelligence, including online behaviour tracking to aid the delivery of convertible sales offers.¹

1. Maximizer CRM: HubSpot Connector is an add-on product at extra cost

Social networking

Build dynamic social profiles of customers and prospects by linking directly to relevant social networks and contacts' LinkedIn profiles.

LinkedIn® integration

- Prospect and generate new leads with the ability to search, view and link directly to a contact's or company's LinkedIn profile from Maximizer
- Enhance the level of customer engagement with access to a contact's LinkedIn profile and shared connections within a company
- Determine key contacts within a company to focus in on those with the greatest influence in the purchasing 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 (e.g. blogs, Twitter, Facebook, LinkedIn)
- Use new user defined fields to capture web links to social media profiles.

Compare Maximizer CRM Editions

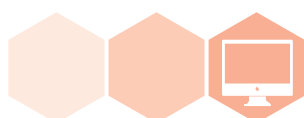
		Maximizer CRM Editions		
User features		Enterprise Edition	Group Edition	Entrepreneur Edition
General	Who it's for	Advanced CRM for medium-sized businesses	Full-featured CRM for small businesses	Contact Manager for entrepreneurs & small businesses
	Minimum number of users	1	1	1
	Maximum number of users	Unlimited	10	5
	Software Assurance ²	Included	Included	Included
Access options	Mobile access (including iOS 6 and Android 4.0 support)	Mobile access	Mobile access	
	MaxMobile CRM for BlackBerry	✓	✓	✓ ³
	Web Access (including Firefox and Internet Explorer support)	✓	✓	
	Windows desktop access	✓	✓	✓
	Remote synchronisation	✓	Add-on	
Sales	Sales force automation	Advanced ⁴	Standard	Basic
	Sales executive dashboard	✓	✓	
	Sales funnel reports	✓	✓	✓
	Lead summary reports	✓	✓	
	Opportunity management	Team and Individual	Team and Individual	Basic
	Opportunity monitoring (alerts)	✓	✓	
	Sales quota management	✓		
	Sales action plan (project management)	✓	✓	✓
	Email templates with merge fields	✓	✓	✓
	Territory management	✓		
	Real-time alerts (out-of-the-box) include lead status alerts, changed forecast, and won/lost deals*	✓	✓	

2. Software Assurance included for one full year. Renewal fee after one year at 20% of licence MSRP.

3. MaxMobile CRM for BlackBerry® is an add-on product for Entrepreneur Edition with additional licence fees. MaxMobile CRM for BlackBerry® requires wireless and server hardware and Microsoft® Internet Information Server (IIS)

4. Advanced Sales Force Automation features include Territory Management and advanced Workflow events.

* Requires Workflow Automation powered by KnowledgeSync. Additional licence fees apply.





		Maximizer CRM Editions		
User features		Enterprise Edition	Group Edition	Entrepreneur Edition
Sales	Account management	✓	✓	✓
	Interactive organisational charts	✓	✓	✓
	Quote management	✓	✓	
	Partner relationship management	Add-on	Add-on	
	Lead management and routing	✓	✓	
	Sales forecasting	✓	✓	✓
	Sales process methodology	✓	✓	
Marketing	Maximizer CRM: HubSpot Connector ¹	Add-on	Add-on	
	Marketing automation	✓	✓	
	Email campaign respondent lists	✓	✓	
	Campaign ROI calculator	✓	✓	
	Lead summary reports	✓	✓	
	Marketing action plans (project management)	✓	✓	
	Automatic campaign subscriber removal*	✓	✓	
	Real-time alerts (out-of-the-box) include lead status alerts, suspended & late campaigns.*	✓	✓	
	Automated email campaigns	✓	✓	
	Automated fax and print campaigns	✓		
	Campaign management	✓	✓	
	Do-not-solicit enforced by system	✓	✓	
	Email monitoring and automatic replies *	✓	✓	
	Campaign failure alerts	✓	✓	
	Web lead capture	✓	✓	
	Customer segmenting with user fields	✓	✓	✓
	List management	✓	✓	✓
Customer service & support	Customer service	Advanced ⁶	Standard	
	Customer service executive dashboard	✓	✓	
	Overdue case, case billing, other reports	✓	✓	
	Case creation based on incoming email	✓	✓	
	Case management (routing, queuing)	✓	✓	
	Case resolution	✓	✓	
	Knowledge base	✓	✓	
	Real-time alerts (out-of-the-box) include case overload, overdue cases, and status changes*	✓	✓	
	Email monitoring and automatic replies*	✓	✓	
	Service billing	✓	✓	
	Customer self-service portal	Add-on	Add-on	

1. Maximizer CRM: HubSpot Connector is an add-on product at extra cost.
 6. Advanced Customer Service & Support Management module includes advanced Workflow events.

* Requires Workflow Automation powered by KnowledgeSync. Additional licence fees apply.

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"Through Maximizer CRM, the team is able to target end users at the relevant time, increasing sales revenue and driving organic growth."

Richard Harris, Managing Director, Lely Ireland

		Maximizer CRM Editions		
User features		Enterprise Edition	Group Edition	Entrepreneur Edition
Business productivity	Customer & prospect action plans	✓	✓	✓
	My work day (customisable home page)	Advanced	Advanced	Standard
	Email, tasks and calendar integration with Outlook	✓	✓	✓
	Email, tasks and calendar integration with Exchange Server	Add-on	Add-on	
	Email templates with merge fields	✓	✓	✓
	Maximizer toolbar in Outlook	✓	✓	✓
	Import/export in standard formats	✓	✓	✓
	Support for HTML email	✓	✓	✓
	Industry packs for high-tech, legal, financial, real Estate)	✓	✓	✓
	Key user-defined custom fields	✓	✓	✓
	Categorised and multi-level user-defined fields	✓	✓	✓
	Mandatory fields	✓	✓	✓
	Database searching with multiple criteria	✓	✓	✓
	Duplicate record checking	✓	✓	✓
	Calendar with product/category tracking	✓	✓	✓
	Calendar for multi-user collaboration	✓	✓	✓
	Calendar with resource & location management	✓	✓	✓
	Computer Telephony integration (CTI)	✓	✓	✓
	Task management	✓	✓	✓
	Account notes	✓	✓	✓
	Account documents	✓	✓	✓
	Company-wide document sharing	✓	✓	✓
	Letters, faxes with merge fields	✓	✓	✓
	User configuration of views	✓	✓	✓
Business Intelligence	Dashboards	✓	✓	
	Reports: Crystal	✓	✓	✓
	Reports: SQL	✓	✓	
	Reports: Web	✓	✓	
	Workflow automation	Add-on	Add-on	
	Partner web access	Add-on	Add-on	
	Customer web access	Add-on	Add-on	





		Maximizer CRM Editions		
User features		Enterprise Edition	Group Edition	Entrepreneur Edition
Workflow	Business activity monitoring & alerting *	Add-on	Add-on	
	Out-of-the-box queries and events to monitor business ⁶	Advanced Event Pak	Standard Event Pak	
	Business process automation*	Add-on	Add-on	
	Automatic report distribution*	Add-on	Add-on	
	Email monitoring and response*	Add-on	Add-on	
Administration	Two-level security support for email templates	✓	✓	
	Data access web service Application Programming Interface (API) ⁷	✓		
	Web following grid integration framework ⁷	✓		
	User interface customisation tool	✓	✓	
	Customisation suite	✓	Add-on	
	Integration with accounting API	Add-on	Add-on	
	Full & read-only access settings	✓	✓	✓
	Field-level security	✓	✓	✓
	Role-based security groups	✓	✓	✓
	Support for Microsoft SMS for installation	✓	✓	✓
	Administrator-controlled live update	✓	✓	
	128-bit cipher public key encryption	✓	✓	
	Administration reports	✓	✓	
	Record global editing	✓	✓	✓
	Windows authentication only for SQL Server	✓		✓
	Single sign-on for Windows desktop access	✓		
	Single sign-on for Web Access	✓		
	Database	SQL Server	SQL Express	SQL Express
Microsoft Integration	Works with Exchange Server	Add-on	Add-on	
	Works with Outlook	✓	✓	✓
	Works with Excel®	✓	✓	✓
	Works with Word®	✓	✓	✓
	Works with FrontPage®	✓	✓	
	Works with SharePoint® ⁸	✓	✓	
	Web Access with Internet Explorer®	✓	✓	
	Support for SMS for installation	✓	✓	✓
	Built for .NET framework	✓	✓	✓
	Integrates with Google® and Bing™ Maps	✓	✓	✓
	Support for SQL Server	✓	SQL Express	SQL Express

6. Advanced Event Pak includes 116 Queries and 78 Events based on features in Enterprise Edition; Standard Event Pak includes 69 Queries and 29 Events based on features in Group Edition.
7. Web Access only.

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8. Requires Customisation Suite - available for Maximizer CRM Group and Enterprise editions. For Enterprise edition Customisation Suite is included in the user price, for Group edition additional licence fees apply.



* Requires Workflow Automation powered by KnowledgeSync. Additional licence fees apply.





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 licences to more than 120,000 customers since 1987.

Certified Solution Provider



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Technology Partners



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
- Resources and information on Cloud based CRM
- An overview of technology and features
- Online demos and features
- White papers and webinars on CRM best practices.

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