

CRM for Customer Service and Support



Maximize satisfaction. Drive repeat business

Servicing customers effectively is a key component in growing your business through loyal, repeat buyers. Whether it's answering a question, resolving an issue, or modifying a product to meet user needs, customer satisfaction levels are critical to your bottom line. Maximizer CRM provides an integrated platform for you and your staff to access and update information efficiently to resolve issues, and for managers to optimize resources, maximise productivity and increase customer satisfaction.

Keep customers satisfied, loyal and profitable

- Effectively track, manage and resolve all customer issues, including technical support, billing and returns
- Track and search on case number, queue, product, or assigned staff, for instant access to details when a customer calls
- Resolve issues faster with easy access to a complete history of every customer in one central location
- View records of previous communications to respond quickly, including emails, call notes and staff remarks
- Access customer credit status and purchase history directly¹
- Make the best use of specialised knowledge by assigning cases based on expertise. Set up automatic email alerts to specialists for faster response
- Track case assignments and escalations to ensure every issue is

resolved so customer satisfaction remains high

- Get automatic notifications of overdue cases and other critical incidents².

Optimise resources and maximize productivity

- Minimise errors with pre-populated fields in the customer case form, or allow for quick case creation based on incoming email
- Save multiple emails to one single contact in one click
- Respond faster and improve call productivity with computer telephony integration (CTI) which automatically identifies inbound callers directly within Maximizer CRM
- Review and resolve customer service cases from the field through Web Access or on your smartphone.

Track, manage and resolve customer service issues

- Easily track details of customer problems by configuring case-related fields, such as product application or model number
- Easily search for customers using customisable mandatory User-Defined Fields, with specific issues to follow up when product fixes are available
- The "prompt for values" screen has been enhanced when retrieving a saved search, making it easier to use
- Search results will always be listed company followed by contact.

Key Benefits:

- Provide customer service staff with the tools they need to help customers quickly
- Get visibility into customer inquiries and satisfaction to guide staff resources
- Foster long-term customer relationships and streamlined processes for resolving issues
- Reduce workload by automating processes and providing web-based self-service.

Maximizer CRM's built-in Customer Service module enables managers and their teams to effectively service customers by accessing and sharing information across Sales, Marketing and Customer Service & Support.



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Access your CRM system via almost to manage your customer service cases and ensure fast resolution and customer satisfaction.



Gain visibility into team performance to manage resources

Gain real-time visibility into your business with business intelligence. Effectively make informed business decisions with timely, accurate insight into your organisation. Maximizer CRM delivers real-time visibility and actionable insights through robust business intelligence right out of the box. It provides managers and executives with critical sales, marketing and customer service information at a glance. Visual dashboards, in-depth metrics and timely alerts and reports enable rapid and effective evaluation so you can take action.

- Instantly view details of all outstanding cases sorted by representative, including elapsed time, priority level and status through powerful dashboards
- Configure your own dashboards to display key performance indicators for a personalised view of metrics at a glance
- Enhance your insight further by drilling down to view the data behind the metrics in a detailed list that can be formatted, sorted and exported to Excel
- Recognise critical service issues that require immediate attention by setting up visual alert dashboards
- Leverage over 175 standard reports, including Overdue Cases by Representative, Case Assignment and Case Billing

- Export reports to Excel® with one click for deeper analysis
- Monitor and be alerted to critical customer service issues based on specified performance indicators
- Save time by automating weekly reports and distribution to managers.

Resolve issues faster with resources stored in the knowledge base

Maximizer CRM Knowledge Base¹ is a searchable online repository of information that enables customer service and support staff to resolve issues faster to keep customer satisfaction high. Staff can access and create Knowledge Base articles directly through Maximizer CRM; while partners and customers can also find answers to questions through Partner web access and Customer web access. Creating a Knowledge Base allows fast, easy online access to service and support information, freeing up your resources, while providing your customers with timely answers to frequently asked questions.

- Reduce inbound calls by empowering partners and customers to help themselves, minimising your team's workload
- Reduce the time required to resolve service cases and trouble tickets
- Avoid duplicating effort by arming your reps with access to updated, detailed product information in the Knowledge Base. Answers to many

customer issues are a click away with fast keyword searching

- Answer customer issues in a single click with fast keyword searching
- Share successful incident resolutions and product-specific details with other representatives
- Improve customer satisfaction with faster time-to-resolution.

Reduce workloads by providing self-service

With Maximizer CRM's customer self-service, your customers are able to login to a web portal that is integrated with your CRM system. Through this web self-service option that provides today's demanding customers with quick access to their online order status and service ticket information, it reduces your team's workload so they can spend their time in areas where their expertise is required.

- Reduce calls by giving customers and partners the ability to search your online Knowledge Base for product updates and answers to FAQs
- Improve customer satisfaction by allowing customers to create and check the status of customer service cases themselves.

Automate processes to ensure high quality service

Automatically respond to critical business activities and monitor staff performance with Workflow



*Customer Self-Service:
Customers and partners create
and check the status of their
cases themselves.*



Automation, powered by KnowledgeSync, to ensure every customer service case gets the attention it deserves.

Some examples:

- Provide customers with the highest level of support by tracking expiration dates of service level agreements and sending renewal notices
- Search for overdue or stalled cases every morning and send email alerts to resolve them quickly
- Send an alert when more than X cases are entered for a customer in a week
- Monitor incoming emails and automatically create customer service cases based on intelligent tracking of messages.
- Get immediate access to the client record to review details and simultaneously make notes on the current conversation
- Make inbound call center, sales or service staff more efficient while improving customer satisfaction
- Improve productivity and call accuracy by never having to manually dial calls again
- Simply select the customer in Maximizer CRM and engage the call directly from there - your staff are ready to sell, service and keep accurate communications history on that client.

Computer Telephony Integration (CTI)²

For sales and service staff to collaborate effectively, capturing details of phone conversations is a critical piece of customer history. With Computer Telephony Integration (CTI), using Maximizer CRM with a phone system maximizes productivity on incoming and outgoing calls.

- Maximizer CRM detects the caller and automatically displays the corresponding record in the system

1. Knowledge Base is included with Maximizer CRM Enterprise Edition and is available as an add-on with Maximizer CRM Group Edition

2. To use CTI with Maximizer CRM, your phone system (driver, hardware) must be enabled for telephony application programming interface (TAPI); you must have caller ID service from your phone service provider and hardware that is compatible.



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.

Technology Partners



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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:

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