

# 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
- When providing service updates use the new anti-spam feature to ensure emails are never sent to individuals who have opted-out by selecting the email type within the email editor
- View records of previous communications to respond quickly, including emails, call notes and staff remarks
- Access customer credit status and purchase history directly<sup>1</sup>
- 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 incidents<sup>2</sup>
- Using the new alarm panel see all cases assigned, actions required and the contact's address book details to track each case and escalation issues with other teams, to reduce case resolution times
- Use the new Excel Reports tool, to access a library of built-in report templates, or create your own reports that will update in real-time, allowing for instant data manipulation via pivot tables and graphs, providing Case Resolution business intelligence.

### 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
- Contact customers via Skype or Instant Messenger, improving speed of service and reducing costs, while automatically updating the Notes box, so you can make notes on the call against the contact entry

#### 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
- Access Case Resolution statistics with new Excel reporting
- Communicate with customers according to their preferences with the new anti-spam tool
- Add group titles, hide blank fields and modify key fields dialogues to help organise the information important to the customer services team, at a glance
- Use the new alarm panel to ensure all case actions are completed in a timely fashion
- Improve productivity and reduce costs using VOIP and IM for outgoing call
- Reduce workload by automating processes and providing web-based self-service
- Use the new Auditing tool to track system usage and identify security issues for the self-service portal.

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.

*Access your CRM system via web, smartphone and tablet to manage your customer service cases and ensure fast resolution and customer satisfaction.*



productively

- 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
- Use the improved functionality of adding group titles into Key Fields. The group titles will help you organise your defined field into an easy to view format, ensuring you view all the important information on your customer at a glance
- 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.

## 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
- Easy view and manipulate case resolution statistics with access to a library of pre-designed report templates which generate Excel spreadsheets allowing you to manipulate the data, including pivot tables and graphs
- 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
- 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 Base<sup>1</sup> 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

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



- 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
- Ensure data security and integrity is maintained, even with self-serve, using the new auditing tool, providing information about data updates, downloads, use of documents, which can be critical to diagnosing potential security issues or misuse of company data.

## Automate processes to ensure high quality service

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

## Computer Telephony Integration (CTI)<sup>2</sup>

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
- 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.

Voice Over Internet Protocol (VOIP) and Instant Messaging  
Improving on the existing CTI functionality you can now also use VOIP and IM integration to may a Skype or IM call direct from Maximizer and the Phone Call dialog box, to maximize productivity and reduce outbound telephone costs.

- The VOIP/IM application can be launched using new URL user defined fields, which can be accessed from the Phone Call dialog box
- The contact records with simplified interface is displayed provide full history of all interactions and notes made against the customer record
- Use of the Phone Call dialog improves productivity, by automatically opening the notes portal, to log the conversation and call outcome, without toggling between windows.

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## 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.

### Maximizer Approved Partner



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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](http://www.max.co.uk) for:

- A trial of the latest release
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