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.

Efficiently pursue leads and improve productivity with fully integrated communications

Maximize the new Opportunities Module, which will allow you to edit and work with your prospects in the same way as you can work with your existing customers in the Address Book. Create or view an opportunity while adding your own basic and user-defined fields, to measure Competitor and Partner activity. Plus, to aid prospect recruitment for maximum conversion rate, use the new Strategy tab to identify success factors, steps and activities taken and what actions are outstanding. Harness the full strength of lead intelligence imported into Maximizer via the HubSpot connector[1], the tool that bridges the gap between Maximizer and HubSpot®, the all-in-one marketing software. All marketing leads generated will seemlessly flow into the sales pipeline, shortening the sales cycle for improved sales conversion.

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
- View a prospect's preferences within the Address Book and 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; and Maximizer will ensure the email is only sent to individuals with consent
- Maximize new responsive email templates available to use within the email editor, including merging fields from landing pages. Ensure emails will present correctly, with accurate personalisation, no matter the device used to view them, including; mobile phones, tablets, laptops or desktops
- Or create and apply dynamic email templates using the new text editor, allowing you to copy content from Microsoft Word and Outlook, while

1. HubSpot Connector, powered by Maximizer and HubSpot All-In-One-Marketing Software, requires a HubSpot account and is an add-on product with additional licence fees.

Key Benefits

- Pursue leads using the new Opportunities tab for strategic oversight to lead conversion
- Optimise revenue generation with functional hotlist tasks and alarm panels for timely lead follow-up
- Convert leads into close sales with the new Strategy Tab
- Clinch top deals by qualifying leads using grouped Key Fields
- Gain real-time insight into your pipeline with Dashboards and new Excel Reports
- Access via the web on your smartphone, laptop, tablet or desktop
- Integrated with social media, Microsoft Office® and Outlook®
- Integrated with HubSpot® Marketing – for excellent lead intelligence.

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.

maintaining formats such as bullet points, text font and size, including the insertion of tables, plus, save all templates to use for prospecting, follow-up messages, welcome 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 Maximizer 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.

Convert leads to solid sales opportunities

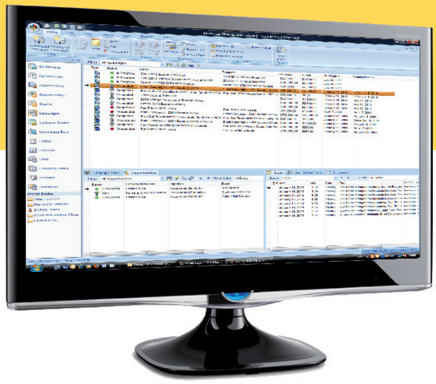
Lead Management

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.

- Use the new Opportunities module to view contacts in the same format as the Address Book, to harness lead intelligence and maximize the new Strategy tab, to manage the lead through the sales cycle, including organising actions required from other departments where applicable
- With HubSpot Connector[1], control which leads are sent to Maximizer, based on customised lead scoring criteria
- 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
- Use the improved Hotlist to manage each stage of your sales process, from lead allocation to closed sale, reallocating tasks to colleagues when required
- 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[2]
- 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

1. HubSpot Connector, powered by Maximizer and HubSpot All-In-One-Marketing Software, requires a HubSpot account and is an add-on product with additional licence fees.

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



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

- Alert the right people automatically[2] 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
- Create your own opportunity view using improved key fields grouping, including managing competitor and partner statuses
- 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

- Ensure all leads assigned are followed-up in a timely fashion using the improved Hotlist feature, in which you can specific a start, end or create a rolling date range to manage each stage of your sales process, throughout the sales cycle, allowing you to complete actions and carry forward unfinished appointments and tasks
- 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
- Capitalise on opportunities with timely automated messages and activities using the new alarm panel. Replacing the pop-up dialogue, a new notification panel will appear, detailing meetings or actions to be taken against a specific opportunity assigned, including the contact's address book details to prep from the initial sales call and generate a higher conversion
- 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 partners 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 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 and Profiling

Build dynamic social profiles of customers and high value prospects, by linking directly to relevant social networks and a contacts' profiles using new URL User Defined Fields to capture web links to a contact's Social Media, for instant access to their profiles and message feeds.

Obtain up-to-date information on your contacts with direct links to external websites and social media profiles (blogs, Twitter®, Facebook®, LinkedIn®).

Social Integration

- Prospect and generate new leads with the ability to search, view and link directly to a contact's or company's profile from Maximizer
- Enhance the level of customer engagement with access to a contact's 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.

Maximizer on your mobile

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 web access allows you to use a vast range of the latest mobile devices, including iPhone®, iPad®, BlackBerry®, Windows Mobile®, Android®, Samsung®, in fact any web-enabled device, 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
- Use quick search functionality and auto-suggest typing to 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
- View calendar with "Find Free Time" tool
- 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
- Use the new Voice over Internet Protocol (VoIP) and Instant Messaging (IM) software to contact prospects direct from Maximizer using Skype, via the phone call dialogue box, which will automatically launch the Notes box, so you can make notes on the call against the contact entry
- 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.

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 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.

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

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

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. Maximize 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
- Use the new Excel Reports tool to access a library of report templates, or create your own reports in Excel, that will update in real-time, allowing for instant data manipulation via pivot tables and graphs, providing enhanced pipeline intelligence
- Personalise each rep's workspace to show the day's priority tasks, appointments and progress on their own sales targets
- With Maximizer CRM: HubSpot Connector, receive greater prospect intelligence, including online behaviours tracking to aid the delivery of a convertible sales offer
- 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.

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.

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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.

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