For Sales

Accelerate Sales. Win More Deals.

Key Benefits

- Gain real visibility into sales performance to guide your team

- Implement step-by-step, repeatable sales processes that are proven to succeed

- Provide sales professionals with the tools they need to succeed anytime, anywhere

- Create collaborative sales processes that harness sales, service and partner resources to win deals

- Leverage existing technologies for on demand desktop, web and PDA access, and continuity with Microsoft® Office and Outlook integration

"We have seen a 500% return on our investment with Maximizer Enterprise. We wouldn't have been able to develop our global sales force without it."

- Cam Buschel, Sales Analyst, StemCell Technologies

Maximizer Enterprise **"For Sales"** is part of the integrated CRM Suite for Sales, Marketing, Customer Service & Support.

Sales executives and frontline sales professionals face the ongoing challenge of meeting and exceeding revenue targets. Whether you're in a new or mature market, one thing is certain – you have to win more deals today while building profitable relationships for the future. Get your team working together more effectively than ever before to beat the competition.

Maximizer Enterprise™ 9.5 is the proven, adaptable CRM solution that empowers sales teams with on demand access to complete customer information. Combine this with a powerful opportunity management system, and managers can easily track performance and accurately forecast sales – ultimately improving win ratios.

Manage Sales Effectively to Build Rewarding Relationships

- Respond quickly to prospects and build more intimate relationships with customers, by managing leads, opportunities, and time through one interface.

- Have every customer's entire profile and history at your fingertips, including past proposals, orders, project drawings, and phone calls. View, sort and store unlimited amounts of valuable customer information, such as industry, company size, product preference, last product purchased, and last purchase date, with easily-defined fields specific to your business.

- Enter and retrieve new leads on demand from the desktop client, through web access, on your handheld or smart phone device (Windows Mobile®, Palm®, or BlackBerry® device) – using offline or online wireless options[1].

- Effectively implement sophisticated sales methodologies or straightforward sales Action Plans and apply industry-specific templates to common processes.

- Assign accounts and leads to specific sales people so that every prospect and customer receives a prompt reply.

- Understand your prospects better by keeping track of key decision-makers and other influencers including an interactive drag & drop organization chart.

- Service customers better, cross-sell and up-sell effectively by knowing exactly which promotions your customers have received, and become aware of when they have outstanding issues with your customer service department.

- Stay on track with your priorities – personalize your My Work Day home page to see the day's important tasks, appointments, announcements and/or the key indicators in the Dashboard that are critical to monitoring your team's performance.

- Easily manage multiple tasks and set up meetings with non-Maximizer Enterprise users with two-way synchronization of each other's Microsoft® Outlook® and Maximizer Enterprise calendars and tasks using Microsoft Exchange Server. Then you can also synchronize with your handheld device[2].

- Use Outlook as your interface to CRM. With one click, save contacts and emails from Outlook to Maximizer Enterprise.

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Monitor Productivity & Accurately Forecast Sales

- See a high-level, real-time visual snapshot of the company's performance (including the value of opportunities in progress and number of abandoned or won deals) through key indicators in the Dashboard to see which areas are doing well and which areas need attention[1]. Then drill-down to the Crystal Reports® to identify the details.
- Reduce the time your salespeople spend generating reports so they can sell more. Exploit out-of-the-box reports to track sales performance and identify areas for improvement. Set up reports easily by choosing from several different views to present customer, lead, and opportunity information in the best way for print – then export to Excel® for detailed analysis.
- Get real-time updates on daily, weekly or monthly metrics with over 175 standard reports, including sales forecasts, account activities and phone logs, segmented by account manager or sales team leader, month or quarter, and more.
- Accurately analyze your opportunities by generating real-time reports including Sales Pipeline Funnel, Lead Summary, and Forecast Analysis. Automatically print standard reports to regularly review the status of 30-day, 60-day and 90-day funnels.
- Identify projected revenue-by-close percentages at any given point in time with calculations based on success factor and decision-maker influencer ratings, rather than the gut feel of your sales representatives.
- Create your own reports with Crystal Reports XI Professional by Business Objects®, the world's leading business intelligence reporting tool bundled with Maximizer Enterprise 9.5, to gain further visibility into trends. Analyze data in other database applications, such as your accounting or ERP systems, against the customer data in Maximizer Enterprise to get a complete view of your customer history, buying trends and relationships.[3]
- Automatically email weekly reports to managers[4], or trigger reports[5] and alerts based on critical performance indicators, such as when deals are suspended, when a sales rep loses more than 2 deals in a week, or when deals are more than 7 days overdue for closing.

Quickly Follow Up on Leads to Win the Deal

- Import lead lists from virtually any file format that contain all the qualifying information you need for effective follow-up calls. Create targeted customer lists for outbound call campaigns.
- Receive email alerts or follow-up tasks on new leads from your website, including all the detailed information that's gathered from online forms and imported into Maximizer Enterprise.
- Increase lead response time. Monitor and respond to your incoming email with Maximizer Enterprise Workflow Automation[5], powered by KnowledgeSync. Use it on your sales@ or info@ email address: set rules to scan the subject or body of incoming messages for keywords, have leads and product inquiries routed to the appropriate salesperson, email a reply to the sender, and then record the interaction in the customer's record.
- Ensure no lead slips through the cracks. Automatically identify leads that haven't been followed up on in over a week and send the account manager and sales manager an email alert[5].
- Track the status and source of each lead to measure your lead funnel and conversion rate.

Collaborate to Increase Your Win Ratio

- Share information, including calendars, sales opportunities and customer emails, with other members of your sales team—wherever they are. Choose from robust remote synchronization, web access through the Employee Portal or handheld device access: install on your Windows Mobile® device , synchronize with your Palm® device, or access online in real-time with the Wireless Portal[1].
- Track and manage deals from lead to close with the Opportunity Manager - no matter what currency you're selling in.
- Reduce data entry time and minimize errors with pre-filled fields. Allow sales team members to quickly add details to better qualify opportunities.
- Apply your sales methodology and processes —whether you use Miller Heiman's Strategic Selling®, Bosworth's Solution

Reports: Gain greater visibility into the success of your business with sales forecast and pipeline reports, account activity reports, phone logs, and more.

Executive Dashboards: Visualize crucial performance metrics at a glance.

Opportunity Management and Forecasting: Accurately rate probability of close and forecast sales using the sales methodology of your choice.

On Demand Access: Access customer profile and history, leads, tasks and schedules from anywhere.

My Work Day personal homepage: See the day's important tasks, activities, announcements and/or key indicators to stay on track.

Selling™, SPIN® Selling or a process unique to your company— to increase your win ratio. Tailor your methodology for multiple products and target markets with unique steps and activities for each of them. Track all sales activities and assign steps to team members. Rate each deal's success factors, influencers and decision-makers to get an accurate assessment of your probability of close.

- For more simple sales processes, use Action Plans to simply create and assign a series of tasks that get you closer to closing the deal. Use automatic alerts to ensure you and everyone on your team stays on track.
- Teams change – re-assign multiple follow-up tasks, leads, opportunities and accounts quickly with global editing.

Increase Productivity with One-Stop Customer Communications

- Easily access your Microsoft Outlook information and email exchanges while on the road or in remote offices using either Maximizer Enterprise or Outlook as your interface. Store all your communications with each account record, including emails sent and received through Outlook with one-click access.
- Use Maximizer Enterprise with other Microsoft Office applications: Word for creating letters and FrontPage for HTML email campaigns, including merging any database field to personalize content; Excel for importing and exporting data.
- Improve your customer responses by creating templates of effective sales letters to share with sales staff, which they can then personalize and use for campaigns or individual customers.
- Close the loop with Marketing. See a list of people who responded to email campaigns so you can follow-up on leads.
- Before making an important follow-up call on a big account or prospect, check the status of any outstanding customer service cases, and know which marketing promotions they're being offered. They will appreciate the extra attention.
- Focus your time on selling. Redirect post-sales technical, late shipment and billing issues to the customer support, shipping or accounting department. Simply create a customer service case and assign it to the appropriate person to ensure their issues are quickly resolved.

Automate Proven Sales Processes to Ensure Success

- Automate everyday tasks, catch critical time-sensitive issues and stay on top of the big opportunities with Maximizer Enterprise Workflow Automation, powered by KnowledgeSync[2]. Use proven sales process workflow templates to get up and running faster.
  Examples:
  - ✓ Automatically identify leads that haven't been followed up on in over a week and send the sales manager an email alert.
  - ✓ Automatically send the sales manager a summary of the top deals pending this quarter or the most recent activity on the top three accounts for each sales representative.
  - ✓ Send alerts about clients with pending sales who have been put on credit hold.

Drive Channel Sales

- Assign leads to partners with an automatic email alert so they can check opportunity details in the customizable web-based Partner Portal. Your resellers, agents and distributors can follow-up immediately by simply logging in to the secure website to get all the detailed information their hot leads.
- View your partners' sales pipeline status in real-time so you can develop a more accurate and complete sales forecast.
- Gain greater visibility into partners' relationships with end-users. Gather valuable information from the field, such as why deals are won or lost, and modify your sales and marketing efforts to improve win ratios.
- Give resellers the information and tools they need in the field to sell more effectively by posting partner announcements and links to partner marketing materials.
- Help resellers resolve their customers' issues by giving them access to your online Knowledge Base for FAQs, product information and alerts.

Access Up-to-the-Minute Product Information

- Get immediate access to the latest price lists, datasheets and brochures created by your marketing department through the Company Library and email them directly from there.
- Stay informed about known product issues, workarounds and modifications by setting alerts to check your Knowledge Base.

Check Credit Limits, Create Quotes Faster with Accounting Integration

- Service your customers faster with Accounting Link for Intuit® QuickBooks®[6]. Quickly and easily see up-to-date information on their credit limits and balances, past quotes and invoices directly in their Maximizer Enterprise customer record.
- Create new estimates and orders with up-to-date price lists directly from Maximizer Enterprise.
- Not using QuickBooks? The Customization Suite's accounting API programming interface will enable IT professionals to customize integration with other leading accounting programs such as Great Plains to create a one-stop shop for customer information[7].

"For the money, I can't imagine a better set of products than the Maximizer Enterprise Suite that could have better supported our business through the growth we've experienced - including a growth in assets under management by an average of more than 30% per year while retaining 99% of our clients."

Kevin J. Timmerman, President, Steele Capital Management"

[1] Web and Wireless Web (for BlackBerry devices), and Dashboards available only in eCRM Suite. MaxMobile for Windows Mobile PDAs requires additional licenses.

[2] Synchronization with Exchange Server requires MaxSync add-on product.

[3] Reporting in other applications requires additional Crystal Reports licenses, available through Maximizer Software.

[4] Requires Crystal Reports Server add-on product.

[5] Requires Workflow Automation add-on product.

[6] Accounting Link is an add-on product.

[7] Customization Suite is an add-on product.

For More Information

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9 Reasons that Make Maximizer Enterprise Better

- Award-winning, intuitive, integrated sales, marketing, customer service & support CRM software
- Adaptable to your business demands
- On demand access: Desktop, PDA & Web-Ready
- Rapid deployment & results
- Works with Office, Outlook®, and accounting programs
- Bullet-proof security
- Architecture built on industry standards
- Affordable: Lowest total cost of ownership in its class
- Proven with over 7,500 customers and over 10 years focused on customer managment software

Maximizer Enterprise 9.5

Designed for small and medium-sized businesses, Maximizer Enterprise 9.5 rapidly helps companies gain strategic insights and implement winning strategies that will outperform competitors. This proven, affordable CRM solution gives sales, marketing and service professionals the tools they need to attract prospects, win new customers and increase repeat business.

About Maximizer Software

Maximizer Software has helped over 7,500 Maximizer Enterprise customers and more than one million Maximizer users grow their businesses by building profitable customer relationships with award-winning solutions.

For more on Maximizer Enterprise 9.5, go to www.maximizer.com for access to:

- More product details
- Online demonstrations
- Live webinars
- CRM best practices white papers
- 30-day trial software
- Pre-recorded webcasts
- System requirements

Maximizer Enterprise works with technology from the following partners

Microsoft GOLD CERTIFIED Partner | **Business Objects** | **BlackBerry** Alliance Member | designed for **QuickBooks** | **PERVASIVE** Unleashing the value of data | **Vineyardsoft**

Awards

2006 SIIA //CODiE// FINALIST | Business **MIDMARKET** PRODUCTS OF THE YEAR | THE 2005 **CRM LEADER AWARDS** | **CRM** Excellence **TMC** 2005 | ism **TOP 15 2006** www.ismguide.com

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