

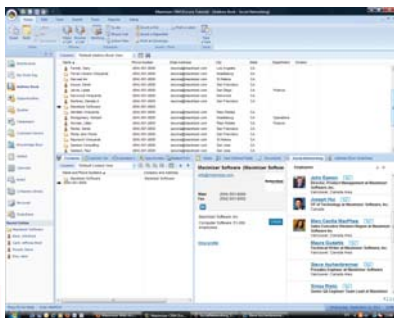
# What's New in Maximizer CRM 12?

## Group and Enterprise Editions

### Maximizer CRM 12

#### Features:

- Account and contact management
- LinkedIn integration
- Time management iCalendar integration
- Task management and automation
- Sales force automation & forecasting
- Marketing campaign automation & management
- Customer service management
- Microsoft Office integration
- Outlook & Exchange synchronisation
- Business Intelligence
- Workflow automation
- Partner relationship management
- Access options: mobile devices, Web, Windows desktop, remote synchronisation



**LinkedIn integration:** Direct access to contact's LinkedIn profile directly from a contact record.

### Attract. Engage. Succeed. ...anywhere, anytime

To be successful, your sales, customer service and marketing teams need access to critical customer information anywhere and anytime. You simply cannot afford to be disconnected from customer requests or potential sales opportunities because of limited access to your CRM. With access through mobile devices, the Web or your Windows desktop, Maximizer CRM 12 gives you your choice of access —whether in the office, at home, or on the road, it adapts to the way you work, and grows as your business grows.

With an unparalleled combination of powerful mobile and web access to real-time data, social profile building and LinkedIn integration, Maximizer CRM 12 empowers you to attract, engage and succeed ... anywhere, anytime. With expanded capabilities in Business Intelligence, marketing campaign management and iCalendar integration, combined with the convenience of an all-inclusive license, Maximizer CRM delivers one complete CRM solution.

### Social Networking

Build dynamic social profiles of customer and prospects by linking directly to relevant social networks and a contact's LinkedIn profile.

### 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 hone in on those with the greatest influence in the purchase decision
- Improve customer service and build customer loyalty with an additional channel of communication

### Social Profile Building

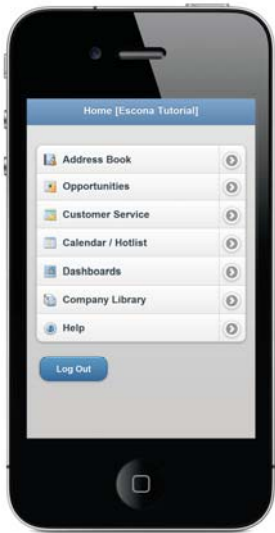
- Build complete customer and prospect profiles by capturing links to all relevant social networks in one place
- Obtain up-to-date information on your contacts with direct links to external websites and social media profiles (blogs, Twitter, Facebook, LinkedIn)

### Mobile Access

Increase productivity and efficiency with an intuitive user interface – optimised for the latest technology – and enhanced appointment management tools.

### Improved User Interface

- Provide teams throughout the organisation the freedom of choice amongst different devices and browsers



**Mobile Access User Interface:** Intuitive, easy to use touch screens optimised for the latest technology.

- Save money by removing the need to purchase and manage different applications based on mobile device
- Increase user adoption and decrease data entry errors using the familiar user interface that optimises the latest technology

### Enhanced Performance and Navigation Tools

- Get instant views of real-time business insights with dashboards for effective and rapid decision-making anywhere, anytime
- Save time with improved navigation tools for retrieving contact information and favorite lists

### Enhanced Appointment Management

- View available time and schedule appointments with multiple colleagues in just a few clicks
- Stay on schedule and on task with email notifications and alerts

### Web Access

View, organise and retrieve key customer information easier and faster with improved Web Access performance and navigation tools.

### Enhanced Web Access User Interface

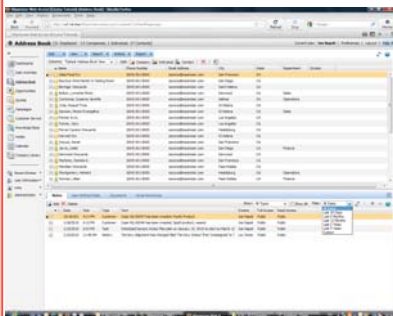
- Home in on only the key information you need in one consolidated window and customisable views
- Increase user adoption with the modern and intuitive interface that is easy to navigate
- View and organise customer information quickly and easily with the new 2-pane window and filter options

### Improved Performance and Usability

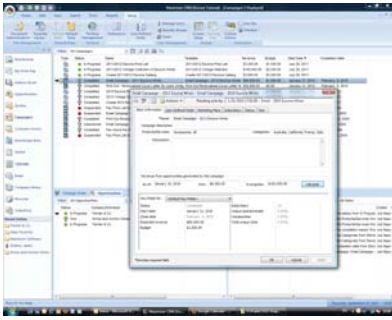
- Enhance the level of communications and reporting with Microsoft® Office®, Word® and Excel® integration
- Ensure data entry and automated workflow consistency throughout the organisation with improved Web Administrator rights
- Increase convenience and flexibility by accessing Maximizer CRM through internet browsers while retaining control of your data stored within your premises
- Enhance customer service with the ability to upload a photo to a contact, or company Address Book entry
- Execute campaigns from the convenience of the web with access to full marketing campaign functionality

### Improved Speed and Navigation

- Save time and increase productivity with improved navigation and faster response time to commands
- Improve the level of customer service with the ability to retrieve contacts, customer service cases and opportunities directly from a company record
- Increase efficiency by performing actions and printing notes directly from a contact's record



**Web Access:** View and retrieve key customer information quickly and easily with the new 2-pane window and filter options.



**Marketing Campaign ROI:** Measure marketing ROI with the ability to associate an opportunity with a particular campaign.

## Marketing Campaign Management

Make informed decisions regarding marketing initiatives with expanded capabilities in measuring campaign ROI.

### Marketing Campaign ROI Measurement

- Effectively measure marketing ROI with the ability to associate an opportunity with a particular campaign
- Improve sales forecasting based on previous campaign performances and redirect resources to initiatives that generate proven returns
- Save time and streamline processes by viewing and accessing associated Opportunities directly from the Campaign window
- Set KPIs and determine campaign effectiveness based on chosen criteria (i.e. number of opportunities, opportunity revenue, etc.)

## Sales Management

Stay focused on revenue generating activities and opportunities with new and enhanced filter options.

- Increase leads and close more deals by viewing and focusing on opportunities with the greatest potential (i.e. shortest lead time, highest revenue, highest probability)
- Manage territories more effectively and allocate appropriate resources with the ability to assign multiple Account Managers to the same territory
- Keep track of critical deals by receiving customised notifications when a sales opportunity has been modified
- Manage your sales pipeline effectively by searching opportunities by close date based on chosen filter options (all, week, month, quarter or year)
- Set goals and track sales quotes the way you want by specifying milestone amounts either as a percentage or a monetary figure
- Strategise more effectively and identify opportunities and risks with the 'Lost To' field in the Opportunity column setup and the Opportunity window

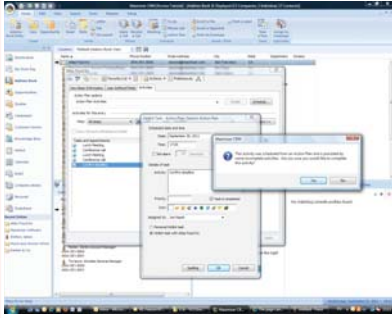
## Business Intelligence

Make swift, effective business decisions, seize opportunities and refine processes with real time key performance metrics and status reports.



**Built-in Reports:** Gain instant views of business metrics with an automated dashboard template.

- Gain instant views of business metrics with an automated dashboard template that you can use right out of the box or customise to capture your own unique key performance indicators
- Share key metrics, save time and improve visibility across the organisation with the ability to email dashboards
- Save money and time by utilising built-in SQL Server Reporting Services (SRSS)
- Quickly and easily retrieve the reports you need with access to built-in reports for each of the main CRM modules (i.e. Sales Opportunities, Marketing Campaign ROI, Customer Service cases)



**Dependent Tasks:** Ensure processes are followed and consistent customer experiences are delivered.

## Usability and Productivity Enhancements

### Direct Links to SharePoint® Documents

- Save time and access the most-up-to date information with hyperlinks to SharePoint® documents, directly from the Company Library

### iCalendar Integration and Appointment Management

- Set-up and manage appointments seamlessly with internal colleagues and external customers using the most popular calendar applications
- Stay on track with two-way synchronisation of appointments between Maximizer CRM & Outlook calendar and any mobile device

### Dependent Tasks

- Ensure compliance regulations are met by setting up an action plan whereby each task is dependent on the previous one being completed
- Deliver a consistent customer experience by ensuring set processes are followed

### Expanded Form Customisation and Display Options

- View and navigate with ease through a customisable layout of all of the key information required based on specific business needs
- Save time and hone in on only the information you need with customisable views

### Enhanced Search and View Filter Options

- Filter communications, lists, searches, and opportunities based on most commonly used date ranges, ascending/descending order and/or only those created by the user
- Increase efficiency with quick access to and categorisation of information based on selected criteria
- Maximise productivity by sending personalised, tailored messages to a number of contacts by merging customer information from opportunities, customer service or address book modules
- Search, print and export (in your preferred format) the most relevant information in using the date filter option in notes and documents
- Conduct faster searches with the ability to choose only your own column setups, favorite lists, or saved searches

## Technology Partners



## Certified Solution Provider



### Why Maximizer CRM 12?

1. **Simple & Quick** to deploy, learn, use and maintain
2. **Access Options** through web, desktop, mobile smartphones and tablets
3. **Value.** Best Value for a full-featured CRM, low total cost of ownership
4. **Expertise.** More than 20 years as a pioneer and leader in CRM.

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

- Information based on your role: sales, marketing, service, executive, IT
- Information on CRM and Contact Management
- An overview of features and technology
- Online demos and free trial software
- White papers and webinars on CRM best practices

Maximizer CRM helps small and medium-sized businesses maximise sales, customer satisfaction and profitability through increased business productivity and optimisation of limited resources

**Maximizer Software**  
Simply Successful CRM™

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