

For Customer Service & Support



Maximizer CRM helps customer service managers and teams to effectively service customers, accessing and sharing information across Sales, Marketing and Customer Service & Support.

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-lasting customer relationships with open communication and streamlined processes for resolving issues
- Reduce workload by automating processes and providing web-based self-service

“We have been using Maximizer CRM since v1.0 — we couldn’t have grown our business without it. With customer service & support functionality, we have improved service response times by 50%.”

Warren Mathusek
Mathusek Inc.

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 10.5 is simple, accessible, and adaptable CRM that provides the platform for staff to resolve issues and for managers to optimize resources, maximize productivity and ultimately increase customer satisfaction.

Keep Customers Satisfied, Loyal & Profitable

- Effectively track, manage and resolve all your post-sales customer issues, including technical support, billing and returns.
- Track and search on case number, queue, product, or assigned staff to quickly retrieve records the next time a customer calls.
- Resolve issues faster with easy access to complete customer account information in one central location. Records of previous communications — including emails, call notes, and staff remarks — are clearly viewed so you can respond quickly.
- Even access customers’ credit status and purchase history directly.ⁱ
- Make the best use of specialized 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 and that customer satisfaction remains high. Get automatic notifications of overdue cases and other critical incidents.ⁱⁱ

Optimize Resources & Maximize Productivity

- Minimize errors with pre-filled fields in the customer case form, or allow for quick case creation based on incoming email.
- 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 with mobile and web access.

Track, Manage & Resolve Customer Service Issues

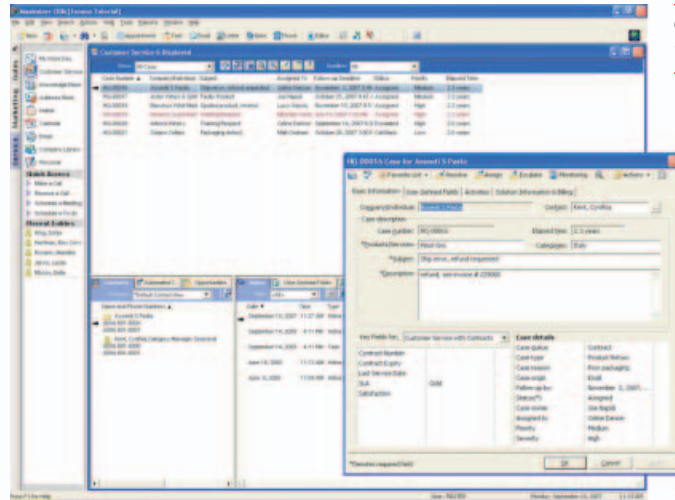
- Easily track details of customer problems by configuring case-related fields, such as product application or model number.
- Easily search for customers with specific issues to follow-up when product fixes are available.

“Given how easy it is to use, and its ability to expand throughout our organization, we expect Maximizer CRM will generate measurable increases in revenue, market share and customer satisfaction.”

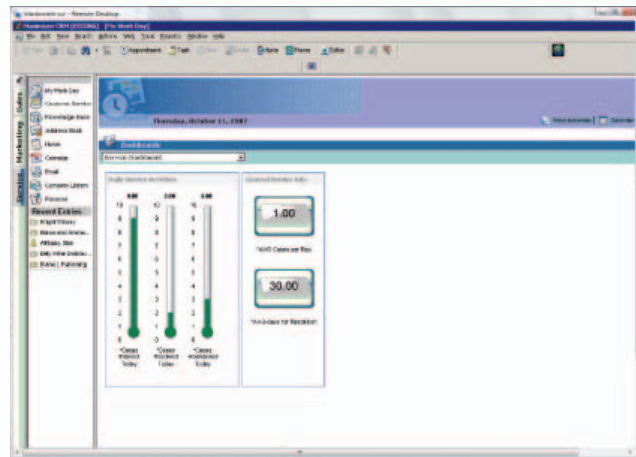
Richard Dovey, President
Atlantic County Utilities Authority

Gain Visibility into Team Performance to Manage Resources

- Instantly view details of all outstanding cases sorted by representative, including elapsed time, priority level and status.
- Drag-and-drop dashboard with your choice of key performance indicators (KPIs) provides personalized view of metrics in one glance, including outstanding cases.
- Recognize critical service issues that require immediate attention by setting up visual Alert Dashboards.
- Get real-time updates with over 175 standard reports, including Overdue Cases by Rep, 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.



Customer Service Management:
Track and resolve customer issues quickly.



Customer Insight: Instantly view staff productivity and customer cases in a daily dashboard.

Maximizer CRM 10.5 Features

- Account and contact management
- Time management
- Task management and automation
- Sales force automation
- Sales forecasting
- Marketing automation
- Email marketing
- Customer service management
- Microsoft Office integration
- Outlook & Exchange synchronization
- Accounting integration
- Business Intelligence
- Workflow automation
- Partner relationship management
- eBusiness
- Access options: mobile devices, web, Windows desktop

Technology Partners



Certified Solution Provider



Resolve Issues Faster with Resources Stored in the Knowledge Baseⁱⁱⁱ

- 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.
- Share successful incident resolutions and product-specific details with other reps.

Reduce Workloads by Providing Self-Service^{iv}

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

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 message.

i. Accounting/financial information history available when using Accounting Link for QuickBooks for Dynamics GP – both add-on products available through Maximizer Software. Custom integration options available through the Customization Suite.

ii. Automatic notification of overdue cases and other items requires Workflow Automation powered by KnowledgeSync – an add-on product with additional license fees.

iii. Knowledge Base available only in Enterprise Edition.

iv. Self-service through the web requires Customer and/or Partner Web Access licenses.

Why Maximizer CRM 10.5

1. **Simple** and quick to deploy, learn, use and maintain.
2. **Access** to critical information through mobile devices, the web and Windows desktop options.
3. **Best value** in its class for full-featured CRM.

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

Visit www.maximizer.com 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

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