

# MaxExpress Professional Services

"I was personally very pleased with the quality of response and support we've received from Maximizer. From the initial contact, through installation, to our in-house user training, the Maximizer team was responsive and very helpful. We couldn't have met our tight timelines without such quality support."

Mark Heaton, IT Manager, South Carolina Department of Commerce

## MaxExpress Configuration

The MaxExpress Configuration Package is designed to provide you with the essentials for configuration and Training of your Maximizer CRM Live system. Our Maximizer CRM Live expert advisor will assist in with the process and ensure that your system is set up and running smoothly.

The program is intensive and requires the focus of your team for all sessions to ensure success. It starts with an initial planning conference call with your Maximizer expert advisor and team to determine the level of assistance required and planning of four (4), four-hour sessions to get you started. These sessions will cover the following:

### Business Process Capturing and Mapping

Ensuring that your organization will adhere to your CRM processes and practices using Maximizer CRM technology is the key to a successful deployment. This is critical for user adoption and to ensure that you are capturing key data points for future reporting and metrics.

- Maximizer CRM Business Process Guide walk-through with your CRM advisor will capture:
  - Importation of data from other sources – excel spreadsheets
  - Business objectives of the Maximizer CRM Live system
  - Key processes to be supported by Maximizer CRM Live
  - Naming conventions
  - Security needs and definitions
  - Required data points

### Configuration based on the Business Process Workshop

- Addition of 20-30 User Defined Fields and Folders
- Addition of two (2) security groups, plus an all access administrator group.
- Addition of five (5) Column Views
- Addition of four (4) Dashboard Items
- Addition of four (4) Custom Searches
- Addition of two (2) Action Plans or 1 example Quick Email template.
- One (1) hour walk-through and knowledge transfer on how the configuration was done so you can make future modifications independently.
- Additional configurations as time allows up to four (4) hours total

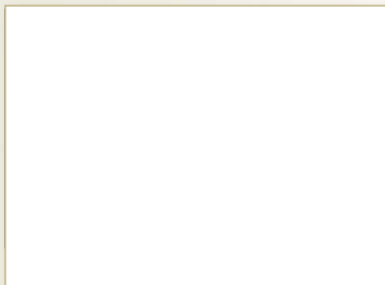
## Maximizer CRM Live Features

- 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® and Word®
- Business Intelligence
- Access options: the Web and mobile smartphones & tablets

### Technology Partners



### Certified Solution Provider



## Data Migration

- Import of Basic Contact & Company information from an excel spreadsheet up to 30 rows and 10,000 records.
- Data Migration from one existing Maximizer version 7 or higher database to the Maximizer CRM Live solution.
- Additional imports as time allows up to four (4) hours total

## Power User Training

- Two (2) hour virtual session of private, instructor-led Maximizer CRM Power User Training for you and your team.
- Training covers the essentials of Maximizer CRM. The standalone Maximizer CRM Power User certification course covers four (4) days, but these sessions will get you started in the area of your choice: sales or customer service.

## Remotely, at Your Site or at Our Site

With the MaxExpress CRM Configuration Package, you have the choice of on-site or off-site services:

- Maximizer CRM advisor can facilitate all of the services mentioned above remotely off-site, or;
- Maximizer CRM advisor will travel to your location for on-site services. This option has proved to be valuable and facilitates quick constructive communication; however we require that your organization invests in the travel costs, including airfare, meals, accommodations and 50% of advisor's travel time, or;
- Visit our Vancouver office and work with your advisor.

## Training and Follow-Up

- Access to three (3) modules of Maximizer CRM Online Training (self-directed).
- Two (2) pre-scheduled follow-up 30 minute phone calls with your CRM advisor over the following 30 days to ensure your new questions are answered.

MaxExpress Configuration Notes:

- 1) Data Migration excludes areas of customization
- 2) Sessions are conducted virtually using WebEx or similar screen sharing tools to complete the guided configuration and walkthroughs remotely.
- 3) Scheduled sessions cancelled within 24 hours will be invoiced.
- 4) Maximizer CRM version 7.0 or higher customers can upgrade to Maximizer CRM 11 through this package.

### Why Maximizer CRM Live?

1. **Simple & quick** to deploy, learn, use and maintain
2. **Access options** through the Web and mobile smartphones & 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.
5. **Choice & Flexibility** to migrate between the cloud and on-premise.

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](http://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.

**Maximizer Software**  
Simply Successful CRM

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