

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 ingredient 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 is simple, accessible, and adaptable CRM that provides the platform for staff to resolve issues and for managers to optimize resources—ultimately, to maximize productivity and maximize 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, notes from phone calls, and staff observations—are clearly sorted so you don’t have to waste time.
- Even access customers’ credit status and purchase history directly.ⁱ
- Make the best use of specialized knowledge by assigning cases based on expertise. Staff get automatic email alerts 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) that enables you to automatically identify inbound callers directly from Maximizer CRM.
- Staff anywhere can review and resolve customer service cases with access from the office or anywhere through the web.

Track Defects & Inform Customers of Fixes or Recalls

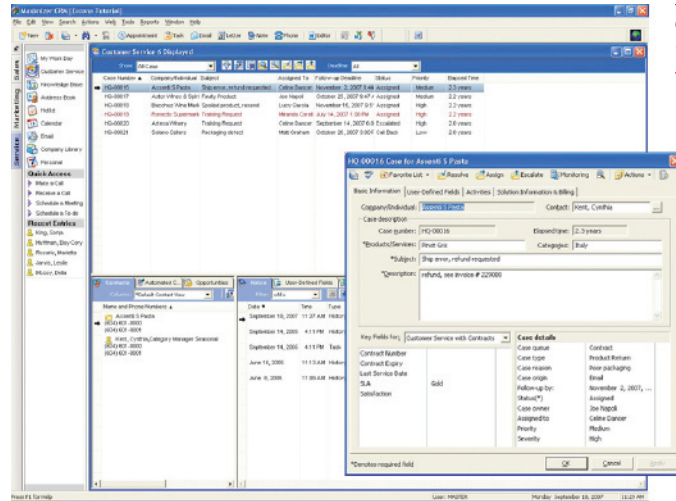
- Easily configure case-related fields to track details of customer problems, such as product application or model number.
- Easily search for customers who had specific problems to send them a notice when product fixes are available.

“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.”

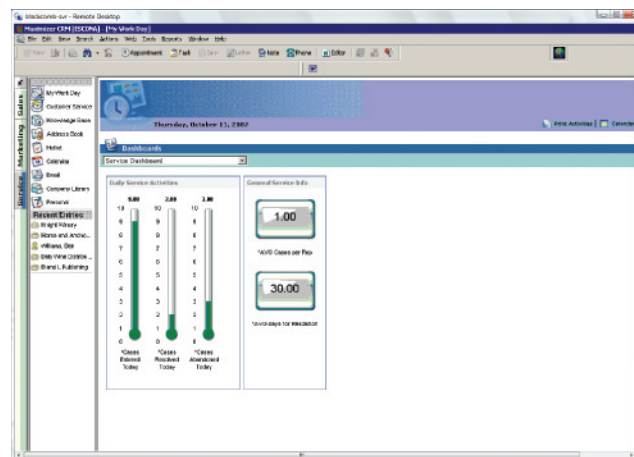
Richard Dovey, President
Atlantic County Utilities Authority

Gain Insight into Customers and Staff to Improve Service

- Instantly view details of all outstanding cases, including elapsed time, priority level and status, by representative. Visualize case assignment to effectively balance workload and maximize customer satisfaction.
- See a high-level, real-time visual snapshot of your department and the company’s performance including outstanding cases, through the dashboard, then drill into details to resolve problems quickly.
- Get real-time updates with over 175 standard reports, including Overdue Cases by Rep, Case Assignment and Case Billing. Then export reports to Excel® for deeper analysis.
- Automatically email weekly reports to managers, or trigger reports and alerts based on critical performance indicators.ⁱⁱ



Customer Service Management:
Track and resolve customer issues quickly.



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

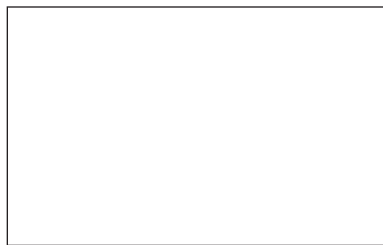
Maximizer CRM 10 Features

- 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: Windows desktop, web, mobile devices, remote synchronization

Technology Partners



Certified Solution Provider



Resolve Issues Faster with 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.

Provide Self-Service to Reduce Workload^{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:

- Make sure customers get the support they deserve 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

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

Visit www.maximizer.com for:

- Information based on your role: sales, marketing, service, executive, IT
- Information on features and technology
- Online demonstrations, trial software
- White papers on CRM best practices
- Webinars

Maximizer CRM helps small and medium-sized businesses maximize revenue, maximize satisfaction, and maximize every single day.

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