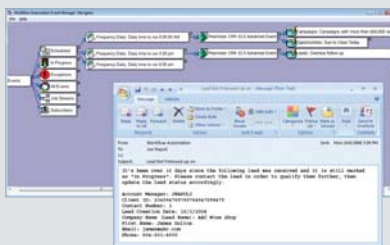




Workflow Automation and Business Monitoring

Maximizer CRM is an integrated CRM solution that delivers decision-making confidence across sales, marketing and customer service. Whether you use Action Plans or Workflow Automation powered by KnowledgeSync to automate everyday processes, Maximizer CRM enables your organisation to succeed on the front line.

- Automate repeatable step-by-step processes and improve productivity
- Identify tasks that require immediate or overdue attention
- Provide everyone with the up-to-date notifications necessary to work smarter



Alerts & Event Manager Navigator: Use the intuitive, visual interface to set up alerts triggered by specified criteria.

Build a Competitive Advantage with Automated Processes and Increased Business Visibility

While the competition struggles with manual processes, queries, and reports on customer interactions, gain a competitive advantage by automating your critical business processes. Action Plans and Workflow Automation, powered by KnowledgeSync, work together to streamline processes and reduce manual work for frontline staff.

Keep projects and processes on track to meet deliverables

Action Plans

Use Action Plans to schedule and route tasks to the right people based on milestone events, prompting timely action or response to customers and prospects. Flexible and easy to configure for business users, create Action Plan templates that assign everyday tasks in order to guide sales processes, marketing projects or services incidents. Implement best practices in your systems and have frontline staff follow the same step-by-step activities to uphold consistency and increase your chances for success.

Automate repetitive and manual tasks for significant efficiencies

Workflow Automation powered by KnowledgeSync

Workflow Automation works as an engine in the background, ensuring that critical tasks — such as assigning web leads, sending automated email communications, or notifying staff of service escalations — are triggered and executed automatically and that relationship building and ongoing communication continues. Complete with over 90 pre-configured queries and 50 events (actions), Workflow Automation helps you automate processes in sales, marketing and customer service as well as those from other systems (such as accounting or inventory systems) to streamline activities automatically — without manual labour requirements.

View and handle critical business issues promptly and effectively

Alerts and Dashboards

With automatically triggered, action-oriented alerts sent to staff via email, Maximizer Hotlist Task or phone, they can respond to time-sensitive milestones or required actions when customers demand. Alerts also keep managers on top of team performance by notifying them of specified exceptions and activities.

Making informed business decisions has always relied on accurate data and reporting to provide the necessary insight into your organisation. Now, with Alert Dashboards that show critical areas of your business that require your attention, you'll have the confidence and agility to respond to your ever-changing business environment as events unfold. Providing visibility into different segments of your business information — such as your sales pipeline, new leads, high priority service cases — Alert Dashboards are easily configured for quick and easy setup, provide drill-down capabilities to view further details on metrics and update dynamically for real-time view of your business conditions.

Set up processes through an intuitive workflow interface

Event Manager Navigator

The visual flow charts of Event Manager Navigator make the creation of business alerts and processes easier and more intuitive. Navigate from one central interface to quickly view, add or modify Workflow events without having to decipher or perform complex programming.

Select from Maximizer CRM's broad range of pre-configured queries and events to monitor your business and automate processes for increased efficiencies and insight.

- Lead Management
- Notify sales or account managers when the following processes are overlooked:
- Lead not assigned
- Lead not contacted after X days
- Lead with no follow-up task created
- Lead with no status update after X days
- Hot lead with no associated sales opportunity
- Sales Representative has created fewer or more than X leads in Y days
- Account and Sales Opportunity Management
- Alert sales or account managers when the following updates occur with sales opportunities.
- Account is not assigned to a territory or account manager
- Sales opportunity is updated with Lost/Abandoned/Suspended with no "Reason"
- Actual revenue of closed deal is < 50% of forecast; or > 125% of forecast
- More than X sales opportunities in progress with one prospect or customer
- More than X lost or abandoned by any rep within Y days
- Due to close this week, probability > 75%
- Forecast revenue or probability of closing is changed
- Opportunities won, lost, suspended, or due to close today
- More than 14 days overdue for closing
- Sales opportunities open for more than 90 days

Quote and Order Management

Monitor quotes being generated and sent to prospects, and the orders being booked, by sending notifications of the following actions to management.

- Quotes over X created, updated as inactive, or expiring in X days
- Account Manager with fewer or more than X quotes in the last Y days
- Orders over X booked
- When more than or less than X worth of orders is created in the last Y days
- Orders older than Y days not yet shipped
- Orders over X cancelled

Customer Service Case Management

Alert the customer service manager or service staff member when the following incidents occur related to customer service cases.

- 10 or more open cases per assigned staff person
- Case priority or status is changed
- Case resolved, or not resolved today
- Follow-up date is today or tomorrow
- More than X open customer service cases with priority "high"
- More than X unassigned customer service cases
- Customer service case open for more than a week
- And automate the following:
- Create Case based on incoming email

Marketing Campaign Management

Notify the marketing manager when the following updates occur with marketing campaigns.

- Campaigns with more or fewer than X sales opportunities associated with it in the last Y days
- Campaigns with more or less than \$X worth of sales opportunities associated with it in the last Y days
- Marketing budget is changed
- Completing this month
- Forecast revenue is changed
- Actual revenue is < 65%
- Campaign Activity is suspended

Automate list management to ensure compliance with anti-spam legislation and clean lists for your next targeted marketing campaign.

- Remove bounced emails from campaigns
- Remove "unsubscribe" requests (email) from campaigns

Staff/Performance Management

Ensure consistent data is entered into Maximizer CRM, and that staff are following process guidelines.

- Receive exception reports on anything you want to monitor with your data and customer interactions, such as notifications when employees enter inconsistent data (missing contact information, unauthorised discounts).
- Send reminders to remote staff who haven't synchronised with the main system for X days.

- Be notified when there are more than X overdue tasks, or overdue for more than Y days for any staff person

Knowledge Baseⁱⁱ

Monitor the articles that are being distributed through the Knowledge Base with notifications of the following actions occur.

- Draft Knowledge Base Article created
- Knowledge Base Article older than X days with status of "Draft"
- Knowledge Base Article published
- Knowledge Base Article expired
- Draft Knowledge Base Article used as resolution to a Customer Service Case

Business Intelligence

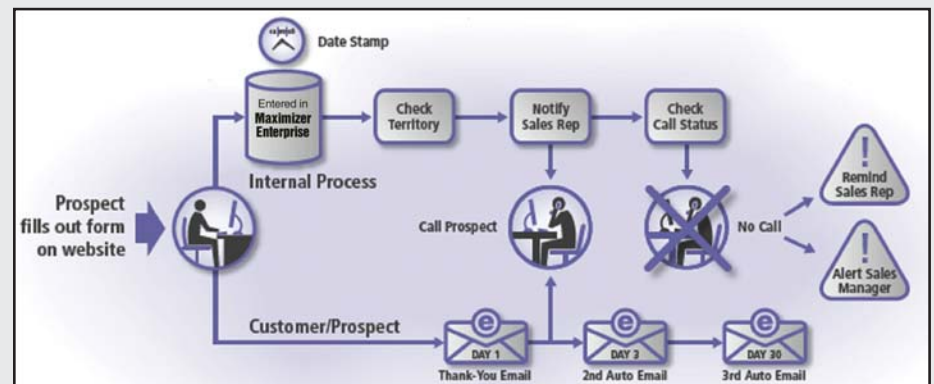
- Generate and distribute reports automatically. For example, schedule sales forecast reports to senior executives every Monday morning.

- Generate and distribute reports when a certain action within Maximizer CRM or other application occurs. For example, if an account manager abandons or loses more than five opportunities in one week, send a sales territory forecast and phone log activity report to the sales manager.

Email Management

- Monitor incoming emails to company email addresses (such as sales@, customerservice@), route to the assigned staff person, create a task or service case and ensure no inquiry goes unanswered.
- Comply with anti-spam legislation with automatic opt-out linked to Maximizer CRM.
- Send an automatic response to email inquiries based on assigned service case or other detail to set the right customer expectations.

Automating lead accountability: a typical scenario



With Workflow Automation, lead management tasks that used to be handled manually are automated and monitored to ensure that no step is missed. For example:

- 1) A web visitor completes a form on your website requesting further information. Contact details are entered into Maximizer CRM and stamped with the day's date.
- 2) Workflow Automation checks the territory and assigns it to the appropriate sales representative, notifying with a task alert for a follow-up call.
- 3) Simultaneously, based on the information the prospect entered into the form, they are placed into a one-on-one follow-up campaign to receive personalised messages specific to the product they had shown interest in.
- 4) If the sales rep has not followed up in a timely manner, an email alert is sent back to them and the sales manager to ensure immediate follow-up.

In this scenario, Workflow Automation saved time, prompted faster response than the competition, and enabled personalized follow-up — all adding up to competitive advantage.

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 synchronisation
- Accounting integration
- Business Intelligence
- Workflow automation
- Partner relationship management
- eBusiness
- Access options: Mobile devices, web, Windows desktop, remote synchronisation

Technology Partners



Certified Solution Provider



Workflow Automation Edition Comparison

Workflow Features	Corporate	Basic	Lite
Maximizer CRM 10.5 Availability	Add-on	Add-on	Included with Enterprise Edition Add-on for other Editions
Email Response System to Monitor Inbound Email	✓		
Event Pak with Queries & Events for your Edition of Maximizer CRM	✓	✓	✓
# Active Events	Unlimited	Unlimited	6
Complex Queries*	✓	✓	✓
Response Formats			
Email text alerts	✓	✓	✓
Email HTML alerts	✓	✓	
Pager alert	✓	✓	
Fax (includes fax driver)	✓	✓	
FTP (post files)	✓	✓	
Crystal Reports	✓	✓	
Run other programs (integrate with back-office applications)	✓	✓	✓
ODBC triggers (integrate with back-office applications)	✓	✓	✓
VBScript (advanced integration with back-office)	✓	✓	

* Complex Queries is the ability to configure an event to use multiple queries, the ability to make one event dependent on one or more other events, the ability to have one event "call" one or more other events, or the ability to trigger an event based on a change made to a database field.

Get Maximizer CRM today and get Simply Successful CRM

- Workflow Automation powered by KnowledgeSync is an add-on product with additional license fees.
- Knowledge Base is included with Maximizer CRM Enterprise Edition and is available as an add-on with Maximizer CRM Group and Professional Editions.

Why Maximizer CRM 10.5

- Simple** and quick to deploy, learn, use and maintain.
- Access** to critical information through mobile devices, the web and Windows desktop options.
- Best value** in its class for full-featured CRM.
- Expertise** of 120,000 customers over 20 years, and over 1 million licenses sold

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

Visit www.max.co.uk for:

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- Information on CRM and Contact Management
- An overview of features and technology
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