



Partner Relationship Management

“The business partner portal is a very attractive feature for our brokers. They love the fact that they can simply log in and access each client’s complete history, make changes, track the services we have provided—it helps them build their own businesses and relationships with clients.”

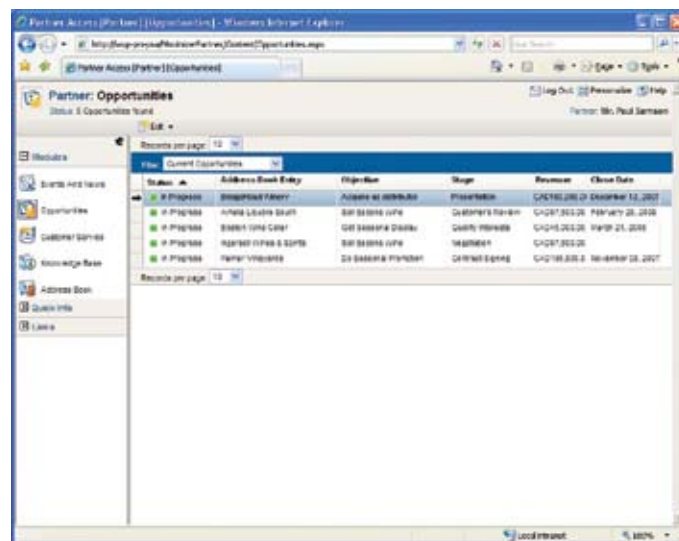
Kevin J. Timmerman, President
Steele Capital Management

Collaborate and Sell. Maximize Partner Success.

Exchanging information about customers, sales opportunities and marketing activities with a network of resellers can be complex and time-consuming. Help your employees and partners handle leads faster, collaborate more effectively on deals, and improve sales forecasting with Maximizer CRM Partner Relationship Management—through the web!

Streamline lead distribution, forecasting and targeted marketing

- Assign leads to partners or resellers, complete with automatic email alerts to retrieve leads through the web. Viewing contact information, profile and background knowledge on leads in real-time, will help them make more effective follow-up calls.
- Improve the accuracy of your forecasting and sales pipeline reports. Allow resellers to view and update their sales opportunities, and add new opportunities, including probability of close.
- Get customer feedback through partners and make more informed decisions.
- Review opportunities by account manager or partner to motivate partner sales.



Real-time Lead Distribution:
Assign leads and opportunities to partners in real-time through the web and receive updates back.

Empower partners with online access to critical answers and solutions

- Give your partners the answers they need—before they need them. Publish answers to FAQs, procedures, and notes about customer service solutions in the Web Knowledge Base.
- Give partners access to a calendar of partner-related activities including marketing campaign dates, training programs and events.

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

Technology Partners



Certified Solution Provider



Help partners provide better customer service

- Let your partners issue new service cases, view cases in progress, and modify existing ones to keep everyone up-to-date.
- Automatically notify partners about the status of cases in progress, case resolutions, or specific related actions and events.

Automate and centralise partner communications

- Make important announcements available to partners through the web with an email alert.
- Save time and money distributing new price lists and marketing materials by making them available through the web.

Provide safe, secure access to confidential information

- Let partners create their own user identifications and passwords for web access, complete with automatic password retrieval.
- Save time by enabling partners modify their own profiles through the web when they move or change their contact information.

Customise Your Partners' Experience

- Your processes are unique—customise the partner experience to reflect your business, including custom windows, tabs, tool bars, and menus.
- The Customisation Suite lets you leverage industry standards, code examples, and an easy-to-use interface for IT professionals.ⁱ

Get Maximizer CRM today and get Simply Successful CRM.

ⁱ Customization Suite is an add-on product with additional license fees.

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.max.co.uk 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 maximise revenue, maximise satisfaction, and maximise every single day.

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Maximizer Software
Simply Successful CRM