



OVERVIEW

Maximizer CRM Live Service Package: Essentials *PRIME*

| MAXIMIZER CRM EMEA



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 **MAXIMIZER CRM**

Your Success Is Our Success

At Maximizer, we recognise that in your decision to adopt CRM, ensuring its effective introduction and ongoing application is critical to achieving your business growth and success plans.

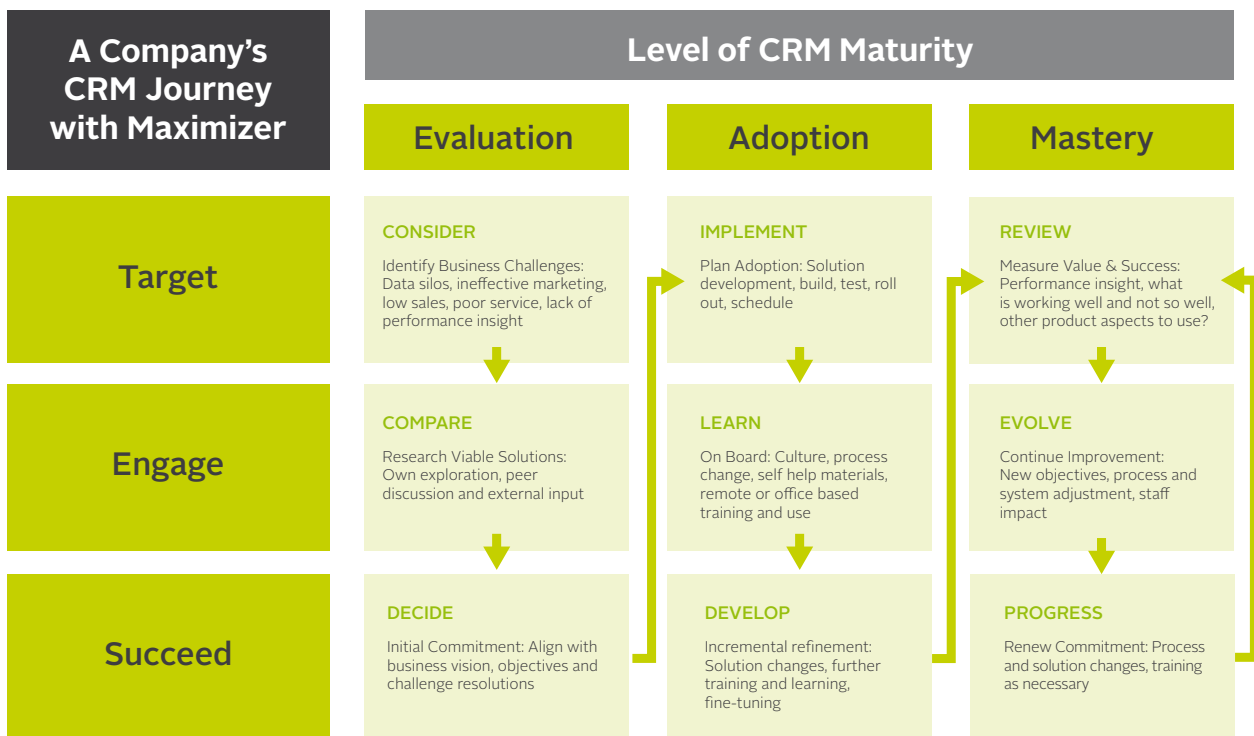
We have, therefore, developed a range of support packages to help you successfully navigate your way through CRM adoption, well on the road to CRM mastery and effective return on investment.

The packages have been designed around Maximizer CRM Live and consist of an assortment of support and training resources that complement your own levels of knowledge and experience together with your requirements and approach to learning and adoption.

The aim of the packages is to assist you in developing your CRM in a phased and logical way, providing the necessary tools and long term knowledge transfer to deliver your CRM effectively and efficiently.

The Maximizer team love nothing better than helping you achieve CRM value and success, so please get in touch if you need any further information or advice.

Packages Available



Maximizer CRM Live Essentials: *PRIME* Package

Our Essentials *PRIME* package is ideal for those who need assistance in getting the software configured cost effectively, with tailored training delivered, to help ensure you maximise the value of your solution immediately.

This package comprises access to all the necessary configuration services, complete with inclusive training tailored to guide you to Maximizer CRM Live adoption success whilst achieving an immediate time to value.

How it Works

This package is focussed on delivering an expert assisted approach to CRM adoption with an express-style configuration service supported by a comprehensive training schedule tailored to the way your own system has been designed.

We will provide a comprehensive overview and interactive demo at the beginning of the process to help get you familiarised with the software. After completing initial online product overview training we then work with you and configure the core modules making the solution relevant to your business. Personalised training is then provided to you showing how to use the system, based on the specific configuration of your solution.

As part of the service expect to gain a fast-track way to make the most out of your solution, as well as a one-to-one review at the end to identify where you are and where you want to be on your CRM journey.

Recommended to Support

- ✓ Small groups of users
- ✓ Those with previous experience of Maximizer CRM or other CRM solutions
- ✓ Preference for an expert assisted approach to getting the system configured correctly
- ✓ Requirement for a personalised training service to support immediate adoption of the CRM solution.

The Solution at a Glance



It's all in the Detail

The Essentials *PRIME* Package consists of the following services:

- 1 Overview of the Maximizer CRM Live software and Mobile access components.
 - 2 Assistance in the setup of Microsoft Office plug-ins.
 - 3 Existing Maximizer customers using version 12 or later – free data conversion service (single Address book only, up to 1Gb in size).
 - 4 Enrolment to the live Group Training Academy:
 - Basic (1 hour)
 - Intermediate (1 ½ hours)
 - Advanced (1 ½ hours).
 - 5 One-to-one review, consisting:
 - Q & A following the training academy
 - Preparation of the configuration service day.
 - 6 Ready-to-Use system configuration – Core + 1 main module (maximum 1.5 days service allowance):
 - Express configuration of the core Address Book module:
 - o Interactive session to gather business objectives and data collection needs
 - o Creation of system fields and user defined fields (maximum 20 fields)
 - o Setup of searches and data lists (catalogued searches – maximum 5)
 - o Setup of Address Book layouts (Key Fields and Column Views – maximum 4)
 - Express configuration service of 1 main module:
 - o Opportunities, or Customer Service, or Administration
 - o Interactive session to gather data collection needs
 - o Creation of system fields and user defined fields (maximum 10 fields)
 - o Setup of searches and data lists (catalogued searches – maximum 5)
 - o Setup of interface layouts (Key Fields and Column Views – maximum 4)
 - o Opportunities module additional items – setup 1 sales process, configure up to 2 KPIs in a Dashboard, set up win/loss/abandoned reasons up to 3 each
 - o Customer Service module additional items– setup up to additional 10 user defined fields, configure up to 2 KPIs in a Dashboard, setup 1 automatic email response template.
 - o Administration module additional items – user account settings (user security and access rights), configuration of general areas and setting e.g. security group profiles, de-duplication and check rules.
- Express configuration of the Calendar and Hotlist Task modules:
 - o Setup of resources, locations, activity types
 - o Setup of column views for Hotlist (maximum 2).
 - Express configuration of system settings:
 - o System preferences (email, calendar, Hotlist tasks, startup)
 - o Lookup lists throughout the Address Book, Calendar and Hotlist modules.
 - Advice given for user security and access rights options.
 - Best Practice advice of configuration for other modules of the software e.g. Sales Opportunities, Customer Service Module, email and Microsoft Word template library and Action Plan library.

- 7 Personalised user training session for up to 5 delegates covering how to use the system in the context of its specific configuration (maximum 5 hours service time). More than 5 delegates – see Package Options and Add-ons below.
- 8 Advanced / Administration training overview session for up to 3 delegates, covering how to further configure the software and manage the solution going forward (maximum 2 hours service time).
- 9 Access to Data import templates and video tutorials.
- 10 Continuous knowledge transfer via the group training academy follow-up courses.
- 11 Assessment of CRM Adoption with the Customer Success Team to help you define the key drivers for future CRM success.
- 12 Periodical reviews to help drive CRM success.



Training Academy

The Maximizer Live Group Training Academy has been set up to assist customers throughout their CRM adoption and mastery journey, covering all the necessary basics in delivering successful CRM. A three-part course, delivered on-line with an instructor gives you the added bonus and opportunity to ask questions as you work through the sessions and to learn from others.



- **Basic Training:** learn how to enter customer records into your database, add useful information for those customers, find them whenever you need to, and communicate with them. Completing this session will give you an understanding of the look and feel of Maximizer CRM, enabling you to progress to the Intermediate Training session.
- **Intermediate Training:** empowers you to use the core modules and functions of Maximizer CRM. Get an overview in creating Sales Opportunities and Customer Service cases, as well as using features such as Hotlist tasks, scheduling appointments, using Word templates and managing emails. This session helps you in becoming familiar with Maximizer CRM.
- **Advanced Training:** gives you the understanding to bring together your Maximizer CRM solution. Learn how to create Dashboards to monitor key tasks and performance. Get an overview of using powerful tools such as advanced searching, email templates, Action Plans, and reports. Discover how to work anywhere with mobile CRM on your phone / tablet.

The Basic, Intermediate and Advance Training courses are organised weekly and enrolment is subject to prior booking only. Ask to see our training agenda schedules for more information and available course dates.

Package Options and Add-ons

Whilst the Essentials *PRIME* package delivers a proven way to delivering CRM adoption, there is additional support and training that Maximizer can provide to help make your journey even easier. Additional package options and add-ons include:



- **Additional Personalised Training:** (covering the Core + 1 module)
Price: £500 maximum 5 delegates per session
- **Ready-to-use System Configuration:** with personalised training (up to 5 delegates) for other modules (see add-ons brochure)
 - o Sales Opportunities
Price: £600 (inclusive half day configuration service at £400, and 2 hours training at £200)*
 - o Customer Services
Price: £600 (inclusive half day configuration service at £400, and 2 hours training at £200)*
 - o Dashboards & Reports
Price: £400 (inclusive half day configuration and training allowance)
 - o Marketing Campaign Manager
Price: £400 (inclusive half day service allowance)
 - o Maximizer Administration & Setup
Price: £500 half day session and 1 hour training (plus £100 per each additional module configured).

*For more than 5 delegates – additional training charges apply per the training costs shown above.

- **Personalised User Training:** Classroom courses delivered at your offices, our offices or remotely, purchased on a module basis (core system, sales opportunities, customer services, administration marketing campaigns, dashboards & reports).
Price: From £250 up to 5 delegates.
- **Data migration / import:** (e.g. from other packages / other data sources).
Price: Subject to requirements.
- **Data conversion:** Any version prior to Maximizer CRM V12 (conversion to a single Address Book only).
Price: Subject to requirements.
- **On-premise installation:** Installation of Maximizer CRM software, other than within the Maximizer CRM Live cloud, requires our remote install service.
Price: £400
- **User Helpdesk support:** (subject to local availability)
Price: £12 per user per month (£144 per annum), charged for all users in subscription.

N.B All prices are subject to VAT at the current rate.

Things to Note

- Our Ready-to-Use system configuration Service, and other add-on services purchased, can be completed either online (remotely) or on site (your offices or our office). Please note that we charge travel expenses where applicable, and reserve the right to charge for overnight stay and subsistence where travel distance exceeds a reasonable time for single day trips. Policies for travel and applicable charges is subject to the local provider delivering the service – please check with your provider for full details.
- The Ready-to-use System Configuration services, and other add-on services purchased, must be completed within 3 months from initial purchase, thereafter delivery of the service is considered as complete.
- We reserve the right to charge a rescheduling fee of £200 where the customer has cancelled scheduled services within 2 business days.
- This package is based on the Maximizer CRM Live platform. Where an on-premise installation is required the applicable installation service add-on will apply.



ABOUT MAXIMIZER

Maximizer CRM is fueling the growth of businesses around the world.

Our CRM solutions come fully loaded with the core Sales, Marketing and Service functionality companies need to optimize sales productivity, accelerate marketing and improve customer service. With flexible on-premise, our cloud and your cloud deployment options, tailored-to-fit flexibility, state-of-the art security infrastructure, industry-specific editions and anywhere/anytime mobile access, Maximizer is the affordable CRM solution of choice.

From offices in North America, Europe, Middle East, Africa and AsiaPac, and a worldwide network of certified business partners, Maximizer has shipped over one million licenses to more than 120,000 customers worldwide.



To learn more contact the Maximizer Business Development Team

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