

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.”

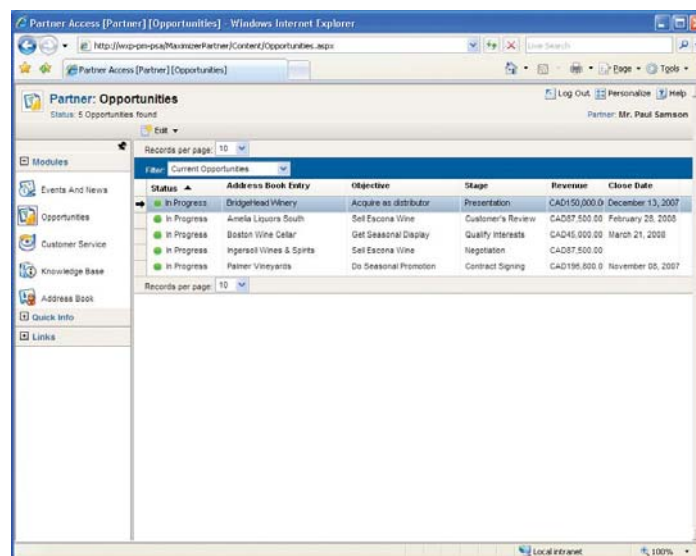
Kevin J. Timmerman, President
Steele Capital Management

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.



Status	Address Book Entry	Objective	Stage	Revenue	Close Date
In Progress	Drigelhead Winery	Acquire as distributor	Presentation	CAD150,000.00	December 13, 2007
In Progress	Amelia Liquors South	Sell Eacona Wine	Customer's Review	CAD87,500.00	February 28, 2008
In Progress	Boston Wine Cellar	Get Seasonal Display	Quality Interests	CAD45,000.00	March 21, 2008
In Progress	Ingersoll Wines & Spirits	Sell Eacona Wine	Negotiation	CAD87,500.00	
In Progress	Palmer Vineyards	Do Seasonal Promotion	Contract Signing	CAD195,800.00	November 05, 2007

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 10.5 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



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.
- Safe 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 Customisation Suite is an add-on product with additional license fees.

Why Maximizer CRM 10.5

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

Visit www.max.co.uk 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 CRM helps small and medium-sized businesses maximize sales, customer satisfaction and profitability through increased business productivity and optimisation of limited resources.

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