



# Maximizer Mobile CRM for Windows Mobile

*“Having customer information available at our fingertips provides our people with the information they need exactly when they need it.”*

Faron G. Thompson, Managing Director,  
Income Property Finance Division,  
Primary Capital Advisors



## ***Reduce Downtime. Increase Customer Face Time. Win More Deals.***

In today's business environment, gain a competitive edge by working at the speed your customers and business demand. Whether you're in field sales, on a service team, or a frequent-flyer executive, your Windows Mobile® device now lets you do more than check email from the cottage. Leverage the mobility of your smartphone and the power of CRM to win more deals and hit your revenue goals.

Maximizer Mobile CRM<sup>®</sup> enables you to stay on top of your game with complete access to the critical customer and prospect information you need — anytime, anywhere.

### **Build profitable relationships**

- Respond on-the-fly to maximize wins and engage existing customers.
- Prepare for your next interaction with a complete view of customer information — including activity, account status and financial history.
- Track each customer's history, including conversations, transactions and service cases to deliver value, build loyalty and increase repeat business.
- Maximize customer satisfaction by resolving and updating service cases<sup>ii</sup> in the field.

### **Increase productivity and optimize sales resources**

- Increase selling and service time with immediate access to customer information, leads, opportunities and cases.
- Conduct timely follow-up and keep deals moving, with access to updated details of sales opportunities.
- Instantly turn customer address details into maps and directions on your Windows Mobile device.
- Log calls and emails to customer records with one-click.

### **Collaborate and access from anywhere**

- Consolidate customer communications into one convenient, action-oriented workspace.
- Focus on your territory by loading the customer records you wish to synchronize, directly onto the device.
- Access local data on your Windows Mobile device offline for faster performance.
- Tap into valuable corporate resources through online Company Library<sup>iii</sup> access to send brochures, quotes and other documents to customers and prospects.
- Share information — including calendars, sales opportunities, and customer emails — with other team members, wherever you are.
- Synchronize wirelessly<sup>iv</sup> from anywhere, or through a USB cable to maintain updated information on your smartphone and with Maximizer CRM in the office.
- Get online wireless web browser access to the entire corporate CRM database, to look up records that aren't synchronized.

### **Measure performance and potential**

- Make real-time updates from the field on lead status and qualification, forecasted revenue and sales opportunity details.
- Monitor productivity to effectively allocate resources and identify areas of improvement.

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

## Technology Partners



## Certified Solution Provider

CABC Ltd  
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 Newbury, RG14 1AS  
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Maximizer Mobile CRM	MaxMobile	MaxMobile Lite
<b>Supported Mobile Devices</b>		
Windows Mobile® smartphone	✓	✓
Windows Mobile® Phone Edition (Motorola Q, Samsung BlackJack & others)	✓	✓
<b>Supported Maximizer CRM 10.5 Editions</b>		
Group, Professional & Enterprise Editions	✓	✓
Entrepreneur Edition		✓
<b>Synchronization &amp; Access</b>		
Two-way data synchronization	✓	✓
Wireless synchronization (Add-on Wireless Sync Server required )	✓	
USB synchronization	✓	✓
Wireless Web Access	✓	
<b>Supported CRM Features</b>		
Companies and Contacts	✓	✓
Leads	✓	
Notes	✓	✓
User-Defined-Fields	✓	✓
Tasks	✓	✓
Calendar appointments	✓	✓
Sales Opportunities	✓	
Customer Service Cases	✓	

- i. Using Maximizer Mobile CRM with Windows Mobile smartphones requires Maximizer CRM licenses, server, and MaxMobile for Windows Mobile licenses. Check <http://www.maximizer.com/support/products.htm> for system requirements and complete list of supported Windows Mobile devices.
- ii. Customer service case management available through Wireless Web Access.
- iii. Company Library available through Wireless Web Access.
- iv. Wireless synchronization requires Wireless Synchronization Server, which is an additional product with add-on fees. USB synchronization included with MaxMobile and MaxMobile Lite.

### 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.

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

### Visit [www.maximizer.com](http://www.maximizer.com) 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

**Call: 01635 570970**

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