

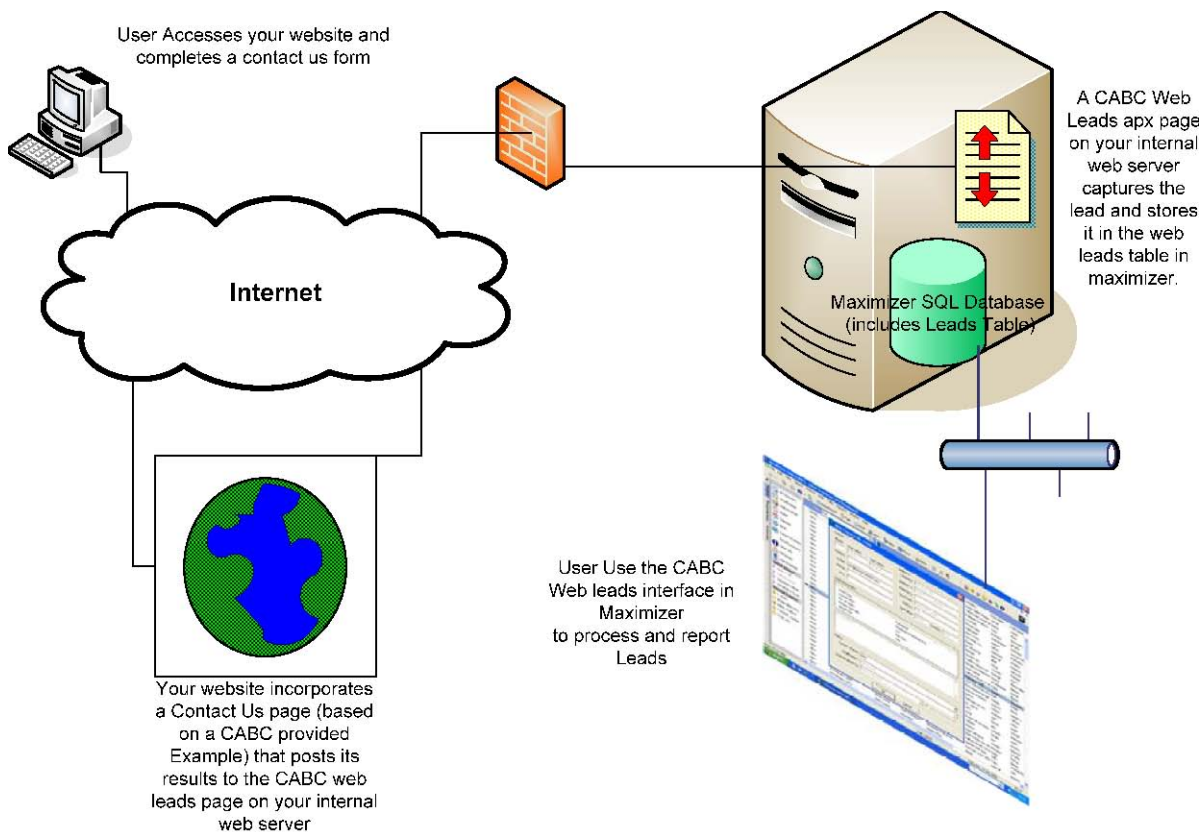
CABC Web Enquiries Window for Maximizer

This application is designed to integrate with a LAN based Maximizer system to provide simple lead collection from your website combined with effective tracking and reporting of enquiries/leads generated.

Measure and track the performance of your web site contact us pages

- Understand the relevance on enquiries (% Junk out of area etc.)
- Understand the performance of different lead forms.
- Understand the performance of your website over time.
- Compare the lead distribution between sales people
- Understand Lead conversion by Salesperson.
- In most cases minimum changes required to your existing website.
- Write Your own additional reports with Crystal Reports IX (not included)
-

Enquiries Window Overview System Components



System Components

The Standard CABC Web Enquiry/Lead application has the following components

- A template web form for your web site that can be modified or copied by your web designer. This runs on your website (external or internally hosted).
- The data collection page. This runs inside your network on an IIS web server that supports .aspx web pages. (This site may be placed in a DMZ if required in which case a SQL port must be opened to your internal SQL server.)
- The Maximizer Database extension tables. These hold the details of the leads in your database.
- The Web Leads window. This is added to each Maximizer LAN users installation to provide access to the leads.
- The Crystal Reports. The web leads window comes with a comprehensive Last 90 days review report. You can create other reports if you have a full copy of Crystal Reports (or similar).

The Lead Process

It is an important part of the design CABC Web Leads window to ensure you always know the outcome of every enquiry. New enquiries cannot be deleted by users only marked as “junk” or similar descriptor.

When new leads arrive you can, if you have deployed KnowledgeSync with Maximizer be notified by email. (The KnowledgeSync rule included with Web Leads).

Only Maximizer user with the correct rights can allocate leads to a sales person.

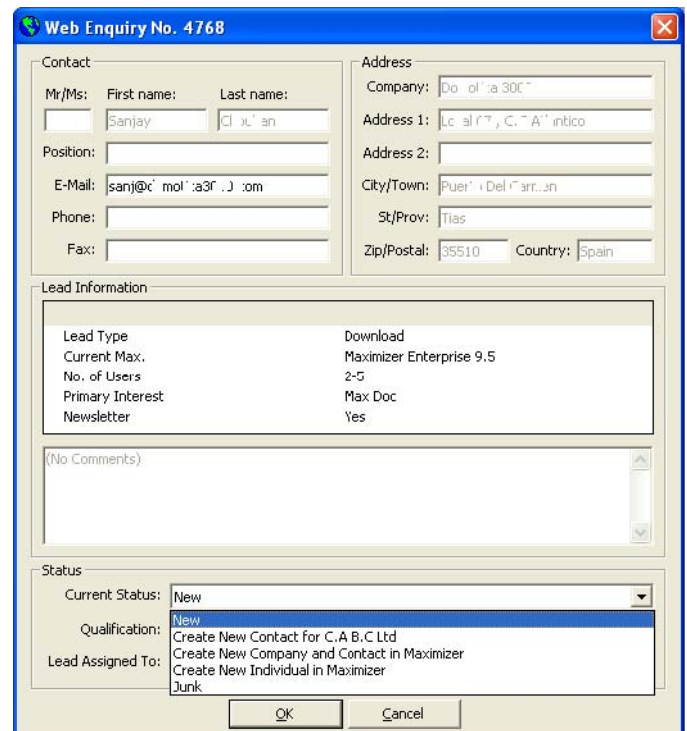
New leads are reviewed on the lead form. (Right)

Lead can be matched to existing contacts using Maximizer searching then the lead can be associated with the existing record from the lead screen (right)

If it's a new contact (or a new company and contact) they can be created in Maximizer directly from the lead form without any data re-entry

Additionally you can optionally set the Maximizer record account manager.

Each lead is summarised in a Maximizer Note on the assigned contact.



Status

Current Status: Assigned (New)

Qualification: Follow-Up

Lead Assigned To: Sales Admin Set Account Manager

OK Cancel

Enquiries/Leads are assigned to a sales person whose role is to qualify the enquiry and update the qualification status. This qualification status list is configured to your needs.

Status

Current Status: Assigned (New)

Qualification: Follow-Up

Lead Assigned To: Follow-Up

- Disqualified - Already Bought Other System
- Disqualified - Competitor/Other Non-Prospects
- Disqualified - Uncontactable
- Qualified - Converted Directly to Opportunity
- Qualified - Converted to Lead
- Qualified - Downloading Latest Version
- Qualified - Mailing List Only

10 August 2007 Sale

3 January 2008 Sale

The qualification process provides a lead outcome which can be used for reporting to understand the conversion rate for enquiries into useful pipeline prospects. Once the qualification has been entered, the tracking in the enquiries/leads window is considered complete and the lead enters the Maximizer pipeline. These qualification status values can be configured to suit your needs.

A sales person can quickly check all enquiries allocated to them by filtering the leads window (below)

Maximizer CRM [CABC] - [Web Enquiries 95 Displayed]

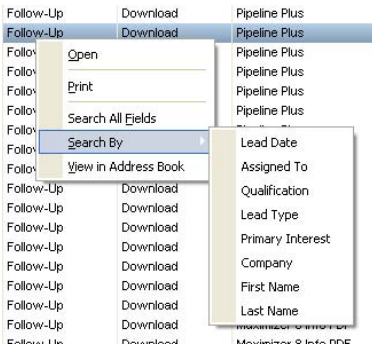
File Edit View Search Actions Web Tools Reports Window Help

New Appointment Task Email Letter Note Phone Edit

Filter: My Follow-Ups

Status	Lead Type	Qualification	Lead Type
New			
All			
Assigned	Download	Follow-Up	Download
Assigned	Trial CD Request	Follow-Up	Trial CD Request
Assigned	Download	Follow-Up	Download
Assigned	Download	Follow-Up	Download
Assigned (New 22 December 2007)	Download	Follow-Up	Download
Assigned (Exis 8 November 2007)	Download	Follow-Up	Download
Assigned (New 30 January 2008)	Live Demo Reques	Follow-Up	Live Demo Reques
Assigned (New 21 July 2007)	Download	Follow-Up	Download
Assigned (New 22 August 2007)	Download	Follow-Up	Download

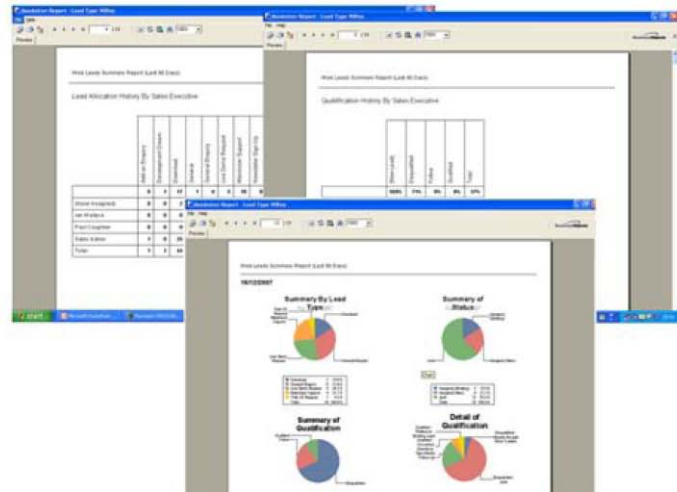
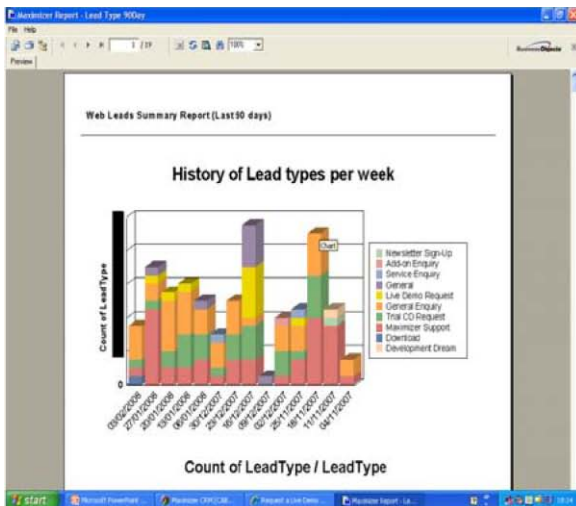
Sales Admin Sales Admin Sales Admin Sales Admin Sales Admin



The list of enquiries is also fully searchable

This allows interrogation of the current and historical enquiry data.

Finally the marketing team can assess your sites performance using the included 90 day summary report illustrated below).



Customisation

The web enquiry system has some elements which can be configured to suit your business, these include:

- The presentation of the contact form on your web site
- Up to 10 fields of product or service information in addition to the core contact details.
- The Qualification & Disqualification Types
- Modification of the included report (Crystal Reports required).

CABC will be pleased as a part of your project to discuss the provision of other enhancements you may require for you own particular system including the provision off additional reports.



Requirements

This system is only available for Maximizer Group and Enterprise Editions from 9.5 to 12 (non- Entrepreneur)

You must be able to host the lead collection page on an IIS 6 or above web server within your business that can support external access.

Data cannot be accessed in the Maximizer web client or on remote ((Max Exchange sites)

You may need to review your Microsoft SQL licence to ensure it complies with this use.

For further details contact

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Maximizer Software
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