DATASHEET

Training for Individuals and Small Groups

| MAXIMIZER CRM

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INSTRUCTOR-LED TRAINING FOR INDIVIDUALS AND SMALL GROUPS

ALL MAXIMIZER TRAINING PACKAGES ARE DESIGNED TO HELP YOU FULLY REALIZE THE VALUE OF YOUR CRM INVESTMENT. LEVERAGE OUR ONLINE AND ONSITE COURSES TO DRIVE HIGHER USER ADOPTION AND ARM YOUR TEAM WITH THE SKILLS THEY NEED TO BE MORE EFFECTIVE AND PRODUCTIVE.

CORE FUNCTIONALITY USER TRAINING

DURATION: 100 MINUTES **$399**

This session is designed for those who are new to Maximizer CRM, and existing users interested in getting more value out of their software. This course takes you through the fundamentals of managing contacts within Maximizer, and effectively using the software's core capabilities.

The session covers:

- Basic Program Interface (Lists, Column Views, Quick Access)
- Recording Correspondence
- Email Integration
- Finding and Displaying Customer Information
- Organizing Time
- User Preferences
- Additional Functionality
- Microsoft Office Connectors
- Customizations

SALES & OPPORTUNITIES MODULE TRAINING

DURATION: 100 MINUTES **$399**

This training package is for Sales Representatives and Department Managers who have completed the Core User training, and want to learn how to effectively use the Opportunity module.

The session covers:

- Lead Tracking and Management
- Opportunities
- Time Management
- Action Plans
- User Defined Fields for Sales
- Web Access & Mobile Access interfaces
- Dashboard & Reporting
- Advanced Excel Export
- Opportunity Strategies

TAILORED WORKSHOPS

STARTING AT **$225**

If you need user training for a specific Maximizer CRM initiative, we can help. Our highly experienced workshop instructors will collaborate with your business leaders to determine requirements, and design a customized learning solution that meets your organization's unique needs.

ONLINE OR ONSITE

All courses are taught on Maximizer CRM Live Web Access. Training can be conducted online, or our consultants can travel to your office anywhere in the world to deliver personalized, in-person training.

CUSTOMER SERVICE MODULE TRAINING

DURATION: 100 MINUTES **$399**

For Customer Service, Technical Reps and Department Managers who want to learn how to effectively enter, manage and track support and service cases. Prerequisite: Core Functionality User Training.

The session covers:

- Customer Service & Technical Support
- Case Monitoring and Notifications
- Time Management
- Action Plans
- Knowledge Base
- User Defined Fields Dashboards & Reporting
- Advanced Excel Export

MARKETING CAMPAIGNS WORKSHOP

DURATION: 5 HOURS **$999**

This hands-on learning experience focuses on the Marketing Campaign module, covering all the steps involved in implementing an automated email marketing campaign. Marketers and Managers learn about designing headers, footers and layout, setting up the email marketing module, connecting to audience lists, and setting up results tracking and reporting. Your marketing team will walk away with a modifiable template and knowledge to run campaigns on your own going forward!

The session covers:

- What is an Email Campaign
- Creating an Email Template
- Launching a New Campaign
- Fixed Date versus Ongoing Campaigns
- Campaign Statistics, Status and Result tracking

WEALTH MANAGER CRM TRAINING

DURATION: 100 MINUTES **$399**

Each 100 minute training package session begins with a 20-30 minute business process review. Once completed, our technician teaches you how to modify and configure the following key areas:

- Custom Fields – modify/create Custom Fields to capture even more pertinent information on your clients.
- Key Fields – modify/create Key Field views to capture the most important information on each client and display it on the Details Screen.
- Saved Searches – modify/create searches to segment clients into categories that make sense to you.
- Action Plans – tailor workflow templates to exactly match both your internal and client facing business processes
- Specialized Dashboards – further modify the existing Dashboards, or create new ones to gain visibility into where your business stands, what you need to do next,and with whom.
- CASL Compliance – configure your system to work within CASL regulations
- Auditing – optimize your system to keep track of who changed which field value, when, and what changes were made.