



# CRM Matchmaker

Finding the right CRM to fit your business

## Step 1 : Must Haves

Selecting the right CRM can be a time-consuming exercise. Before embarking on your quest, save time and money by narrowing down and pre-qualifying your choices with a clear understanding of your “Must Haves”. These are non-negotiable qualities that will help you decide whether a particular CRM provider is worth pursuing.

### INSTRUCTIONS:

- Select your MUST HAVES from the list below and determine a short list of CRM providers that meet your criteria.

Contact Management	E-mail Management	Unlimited Custom Fields	Microsoft Office Integration
Marketing Automation	Lead Management	Workflow/Process Automation	On-Premise Solution
Sales Force Automation	Customer Service Management	Partner Management	Web-Based Cloud Solution
Opportunity Management	Reporting and Dashboards	Social Media Integration	Mobile Accessible Version

## Step 2 : Compatibility

It is natural to want to jump in and implement a CRM solution as quickly as possible. However, sometimes that desire can lead you to place too much importance on qualities that, ultimately, won't contribute to your business success. These compatibility questions will help you further evaluate your CRM matches based on attributes that best fit your business.

### INSTRUCTIONS:

- Add the names of the CRMs you will be comparing in place of "CRM #2" and "CRM #3" at the top of the form.
- Fill in answers to each question in the corresponding columns for "CRM #2" and "CRM #3".
- Consider how important each question is to your business by ranking Low, Medium or High.
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- At the end of each of the 7 categories allocate a score from 1-3 (3 being the highest score) to each CRM solution under consideration.

		CRM SOLUTION PROVIDER			
	RANK	COMPATIBILITY QUESTIONS	Maximizer CRM*		
COMPANY		How long have you been exclusively focused on CRM?	25 years		
		What size of organisations are a fit for your CRM	SMBs & divisions of large corporations.		
		Do you have customers in my industry?	Yes, Maximizer has sold over one million licences to more than 120,000 organisations across all industries.		
		SCORE			
COST		How much does it cost?	On-Premise: £441-£629 Cloud-based: £25-£45 user/mth		
		What is covered in the standard cost?	Complete CRM: Sales, Marketing, Customer Service, Mobility		
		What would the total cost of your base solution be over five years?	On-Premise: Year 1: Software + 20% Software Assurance Year 2-5: 20% Software Assurance. Cloud-Based: Year 1-5: £25-45 user/mth		
		SCORE			

\*Answers refer to Maximizer CRM Group and Enterprise Editions, and Maximizer CRM Live. Maximizer CRM Entrepreneur Edition is not included.

FUNCTIONALITY	RANK	COMPATIBILITY QUESTIONS	Maximizer CRM*		
		Is marketing automation included or is it an add-on with additional costs associated?	Included.		
		Is customer service functionality included or is it an add-on with additional costs associated?	Included.		
		Can the CRM be accessed via smartphones and tablets?	Mobile Access is included.		
		Is it possible to create a self-service knowledge base for our customers and employees?	Yes, you can create and provide online access to searchable service and support information for both internal staff and customers.		
		Can information be shared across departments?	Yes, contact and sales information, services cases and marketing campaign activity is stored in one central location that is easily shared.		
		Can individual and team activity and performance be tracked?	Yes, through reports, dashboards and alerts.		
		Can I easily filter data?	Yes, all the data is list based, customisable with different column views that are easily filtered and sorted.		
		Can I easily share data?	Yes, dashboards and reports can be shared, including with staff not using Maximizer CRM. Data can also be exported to Excel®.		
		Can custom reports be created?	Custom reports can be created at the user level from scratch or modified from the numerous built-in reports in the on-premise editions.		
		Can users edit their own dashboards?	Yes, custom dashboards can be created at the user level.		

FUNCTIONALITY	RANK	COMPATIBILITY QUESTIONS	Maximizer CRM*		
FUNCTIONALITY		Can users create custom views, set ups and add colouring rules?	Yes, there are many ways of customising and configuring. Saved searches and favourite lists also included.		
		Is there remote access to real-time customer and business data?	Web and <u>Mobile Access</u> included.		
		Will it meet my industry specific needs?	Easily adapted to any industry including the ability to change system field labels.		
		Are we able to customise and automate processes to meet our industry and business practices?	Yes, including unlimited custom fields, screens and actions.		
SCORE					
ADOPTION		How user friendly is the solution?	Award winning list-based views with column setups makes Maximizer CRM intuitive, configurable and flexible.		
		Does it integrate with Microsoft® Office®?	Yes, Microsoft® Outlook®, Word® & Excel® integration features.		
		What level of expertise is required?	User: Basic Admin: Moderate		
		How fast can the solution be deployed?	On-Premise: One day Cloud-Based: Within hours		
		Will users require a lot of training?	Easy to get started. In depth <u>user guides</u> provided. For best results some <u>training</u> is recommended.		
		What kind of support and assistance is available?	<ul style="list-style-type: none"> <li>• Manuals and guides</li> <li>• Knowledge base</li> <li>• How-to videos</li> <li>• Live troubleshooting service</li> <li>• Professional services</li> <li>• Self-directed and instructor-led training, and webinars</li> <li>• Extensive partner network</li> </ul>		








	RANK	COMPATIBILITY QUESTIONS	Maximizer CRM*		
ADOPTION		Where can we find documentation, how-to guides, training and online help?	Accessible from within the software or via <a href="http://www.max.co.uk/support-a-services">www.max.co.uk/support-a-services</a>		
		How often is the software updated?	~6-9 months		
		Are there service releases?	Yes, service releases and minor updates occur as needed between each major release.		
SCORE					
SECURITY		What security features are there?	<ul style="list-style-type: none"> <li>• Role and group-based security, including at the record and field level.</li> <li>• Individual security rights, including importing/exporting, transferring and administration</li> <li>• User authentication</li> <li>• Secure database access</li> </ul>		
		Is data frequently and adequately backed up?	On-premise backup is based on company preference and managed through SQL Server. Cloud-based edition is built on a highly secure SQL database, giving you piece of mind as no physical backups are required.		
		Are there provisions for privacy issues?	E-mail opt-out that automatically updates account records. Do not solicit functionality built-in.		
		What level of security and permissions are there for users and groups?	Role and group-based security and access rights (Read/Insert/Modify/Delete) can be set at record, field, note and document level.		
	SCORE				

			CRM SOLUTION PROVIDER		
SYSTEM CONSIDERATIONS	RANK	COMPATIBILITY QUESTIONS	Maximizer CRM*		
		Can I easily add more users?	Adding users is quick and simple and is done at an administrative level. There is no restriction to the number of users.		
		Is it suitable for both small and large installations?	1—unlimited users.		
		As our company grows, will the solution continue to meet our needs?	Unlimited contacts and custom fields can be created. Sales, marketing and customer service functionality available from day one.		
		Can we change deployment options if our business needs change?	Yes, both deployment options are built on the same database architecture so data can easily be migrated without risk of data loss.		
		What Operating System does it run on?	On-premise deployment: Microsoft® Windows XP®, Vista®, Windows 7®, Windows Server® 2003, 2003 R2, 2008, or 2008 R2 (32-bit and 64-bit editions updated to their latest service packs).		
		What are the browser requirements?	Cloud-based deployment and Web Access: Microsoft® Internet Explorer 8.0 or 9.0 or Mozilla Firefox® 8.0 or 9.0, Firefox for Mac 8.0 or 9.0.		
		What are the database requirements?	On-premise deployment: Enterprise Edition - Microsoft® SQL Server 2005, 2008, 2008 R2 (updated to their latest service packs). Group Edition - SQL Express 2008 R2.		

SYSTEM CONSIDERATIONS	RANK	COMPATIBILITY QUESTIONS	Maximizer CRM*		
		What additional server software is required?	Web Access requires IIS configured on Windows® Server 2003, 2003 R2, 2008, or 2008 R2 (32-bit and 64-bit editions updated to their latest service packs).		
		What are the hardware specifications?	Minimum requirements: 1.0 GHz processor speed, 1 GB RAM, 2 GB hard disk space.		
		Is global or mass editing possible?	Yes, global edit features allow editing of multiple fields at one time.		
SCORE					
MY QUESTIONS					
SCORE					

## Step 3 : Your Match!

How do your matches compare? What you discover can then help you decide which CRM is the best fit for your business!

		CRM SOLUTION PROVIDER		
		Maximizer CRM*		
Company				
Cost				
Functionality				
Adoption				
Security				
System Considerations				
My Questions				
<b>TOTAL</b>				

**Congratulations, your match is the CRM with the highest TOTAL score!**

### NEXT STEPS

- ▶ Print your completed ['CRM Matchmaker' evaluation form](#)
- ▶ [Bookmark and share](#) 'CRM Matchmaker'
- ▶ Try Maximizer CRM [online interactive demo](#) now!

### CAN WE HELP?

[info@max.co.uk](mailto:info@max.co.uk)

[www.max.co.uk](http://www.max.co.uk)

+44 (0) 845 555 99 55

