

# Customer Success Story

"Maximizer has significantly increased the volume of my business, not only in terms of referrals, but also repeat business. I now see more of my past clients coming back to me because they really appreciated the personalized service I was able to provide."

Diane Cardoso, Managing Broker,  
Prudential United Realty Jesani.

**Industry:** Real Estate

**Location:** Vancouver, BC

**Web:** [www.ownanicehome.com](http://www.ownanicehome.com)

## Key Benefits

- ✓ Ability to stay connected to crucial client details with Palm synchronization
- ✓ More frequent and productive client communications
- ✓ Ease-to-use interface required only one hour of training

## Prudential United Realty Jesani

### How a real estate agent became "sold" on Maximizer

A career in real estate can easily tax one's organizational skills. Realtors have to keep track of their prospects, past and present clients, new listings, and the status of all current transactions. Fortunately, for top realtors like Diane Cardoso, Managing Broker of PrudentialUnited Realty Jesani in Vancouver, B.C. and member of the Prudential President's Circle and Leading Edge Awards, a new class of contact management software is now available to reduce those challenges to manageable routines.

Contact management software provides the framework for building a database of crucial client and customer information that can be used to keep accurate records, schedule appointments, track calls, and coordinate the sales process. For the past ten years, Diane has recorded all of her client details in Maximizer, a contact manager from Maximizer Software. She records everything from client preferences to personal information such as anniversary and birth dates, job classifications, and even children and pet names, which is kept private in Maximizer. As she gets to know her clients on a more personal level, Diane is looked upon as a trusted advisor, which helps her close more deals faster.

### Problem/Challenge

Prior to purchasing Maximizer, Diane struggled to keep client details organized with a paper-based system and Excel spreadsheets. Over time, as her list of clients grew, Diane needed the ability to contact clients promptly and efficiently; client information often wasn't available at her fingertips when she needed it, which wasted her time and reduced her ability to close deals and gain referrals, an important revenue source for realtors.

Diane began looking for an alternate way to manage her client records and stay on top of her clients' needs, particularly those relating to housing style preferences and buy/sell dates.

### The Maximizer Solution

Diane continues to select Maximizer as her contact manager (since version 3.0) knowing it gives her the ability to manage the complete client life cycle from listing houses on the MLS to handing over the keys. Furthermore, Maximizer lets Diane manage her accounts, track the status of clients, schedule appointments, and synchronize her data with her Palm.

Before choosing Maximizer, Diane did extensive research on other contact managers including ACT!, Goldmine, Top Producer and Agent 2000, but she felt that Maximizer had the easiest learning curve, fastest installation, quickest back-up times, and most robust PDA access.

## About Maximizer Software

Maximizer Software delivers Customer Relationship Management (CRM) software and professional services to meet the needs, budgets and access requirements of entrepreneurs, small and medium businesses and divisions of large corporations. Simple, easy-to-use and affordable, Maximizer CRM enables companies to mobilize their workforces through all-access Web, Mobile and Desktop delivery methods. Easily configurable for organizations in any industry, Maximizer CRM optimizes sales processes, enhances marketing initiatives, and, improves customer service to ultimately boost productivity and revenue. Headquartered in Canada, with worldwide offices and business partners, Maximizer Software has sold over one million licenses to more than 120,000 customers since 1987.

Diane installed Maximizer by herself and was using it the very same day. "I'm extremely pleased with Maximizer's ease of use, not only with the installation, but also for adding client information and backing up and restoring my Address Books. As a realtor, my time is precious and I appreciated how easy this product was to learn. The real estate profession can be extremely competitive so I'd much rather be spending my time helping clients find their perfect home."

Once Diane enters crucial client information into Maximizer, she can search, sort and view her data in a variety of ways. The Hotlist tasks alert her to what needs to be done each day or month and the reports let her know where she's succeeding or falling short of her goals.

Diane integrates Maximizer with Microsoft Outlook so she can send and receive emails right from within Maximizer, while storing important messages directly in her clients' records, including photos of listings. Like many realtors, Diane is constantly on the road visiting with clients or prospecting for new business. As a result, Diane's daily routine starts by synchronizing her Maximizer data to her Palm device. And because her Palm PDA now gives her the ability to stay connected to her client data no matter where she is, it has become the lifeblood of her business. Diane uses her Palm to maintain new property listings, update client info, record room measurements and take notes. By synchronizing these details back to Maximizer, she saves herself hours of time at the end of the day, time that would be spent retyping and updating her records.

When asked about the impact Maximizer has had on her real estate business, Diane replies, "Maximizer has significantly increased the volume of my business, not only in terms of referrals, but also repeat business. I now see more of my past clients coming back to me because they really appreciated the personalized service I was able to provide. The ability to recall even the smallest of details about my clients, such as their pet's name, goes so far in this business!"

**Maximizer Software**  
Simply Successful CRM

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