

# MaxExpress Professional Services

## MaxExpress Installation & Configuration

\$3499

The MaxExpress Installation and Configuration Package is designed to provide you with the essentials for installation and configuration of your Maximizer CRM system. We will assist you with the process, working with a Maximizer CRM expert advisor that will help you get your system installed, set up and running smoothly.

The program is intensive and requires the focus of your team for all sessions to ensure success. It starts with an initial planning conference call with your Maximizer expert advisor and team to determine the level of assistance required and planning of four (4), four-hour sessions to get you started. These sessions will cover the following:

### Installation

- Server installation for all three (3) access methods of Maximizer CRM (Windows Desktop, Web and mobile) with continuous knowledge transfer during the install to ensure self-sufficiency.
- Training on the installation of a client for each access method.
- System Backup & Maintenance Log training.
- Tips & Tricks for ensuring a proper setup.

### Business Process Capturing and Mapping

Ensuring that your organization will adhere to your CRM processes and practices using Maximizer CRM technology is the key to a successful deployment. This is critical for user adoption and to ensure that you are capturing key data points for future reporting and metrics.

- Maximizer CRM Business Process Guide walk-through with your CRM advisor will capture:
  - Business objectives of the Maximizer CRM system
  - Key processes to be supported by Maximizer CRM
  - Naming conventions
  - Security needs and definitions
  - Required data points

### Configuration based on the Business Process Workshop

- Addition of 20-30 User Defined Fields and Folders.
- Addition of two (2) security groups, plus an all access administrator group.
- Addition of five (5) Column Views.
- Addition of four (4) Dashboard Items.
- Addition of four (4) Custom Searches.
- Addition of two (2) Action Plans or 1 example QuickEmail template.
- One (1) hour walk-through and knowledge transfer on how the configuration was done so you can make future modifications independently.
- Additional configurations as time allows up to four (4) hours total.

## Power User Training

- Two (2) hour virtual session of private, instructor-led Maximizer CRM Power User Training for you and your team.
- Training covers the essentials of Maximizer CRM. The standalone Maximizer CRM Power User certification course covers four (4) days, but these sessions will get you started in the area of your choice: sales or customer service.

## Remotely, at Your Site or at Our Site

With the MaxExpress CRM Installation & Configuration Package, you have the choice of on-site or off-site services:

- Maximizer CRM advisor can facilitate all of the services mentioned above remotely off-site, or;
- Maximizer CRM advisor will travel to your location for on-site services. This option has proved to be valuable and facilitates quick constructive communication; however we require that your organization invests in the travel costs, including airfare, meals, accommodations and 50% of advisor's travel time, or;
- Visit our Vancouver office and work with your advisor.

## Training and Follow-Up

- Two (2) pre-scheduled follow-up 30 minute phone calls with your CRM advisor over the following 30 days to answer any new questions.

### MaxExpress Options

Install additional server-side access methods (Windows, Web or Mobile)	\$149 each
Assistance with additional client installs (1 included)	\$79 each
Add a new MaxExchange Installation (training, 1 server & 1 client)	\$749
Add additional new MaxExchange clients (Laptops)	\$199 each
Upgrade an existing MaxExchange installation (server & 1 client)	\$449
Upgrade additional MaxExchange clients (Laptops)	\$129 each
Conversion of data from a non-SQL Maximizer database	\$299
Import of data from a CSV (Excel) file, 30 fields or less < 10,000 records (Additional Data Import services are available. Please call for a quote.)	\$399
24 hour rush installation	\$249

### MaxExpress Installation & Configuration Notes:

1. The MaxExpress engagement must be completed within three months from initial purchase.
2. Scheduled sessions cancelled within 48 hours will be charged a re-scheduling fee of \$200.
3. Wireless Access (for mobile CRM) and Web Access require an external facing configured Web Server in the corporate environment where the Maximizer database server is located.
4. Sessions are conducted virtually using Citrix Go to Assist to complete the guided installation remotely (unless work is schedule to be conducted onsite).
5. Network access from the Internet must be available. Server and client operating systems must be installed and administrator accounts available to your Maximizer CRM Advisor.
6. Upgrades from Maximizer CRM 6 and earlier are available on a time and materials basis.

**Maximizer Software**  
Simply Successful CRM

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