CASE STUDY

Mindset Consulting

| FINANCIAL/WEALTH MANAGEMENT

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MINDSET consulting

"MAXIMIZER CRM LIVE IS TRULY THE ENGINE OF MINDSET CONSULTING – IT DRIVES EVERYTHING WE DO AND ENABLES US TO DELIVER ON PROVIDING HIGH AND CONSISTENT LEVELS OF SERVICE TO OUR CLIENTS."

Sherri Ostropolski
Co-Owner and Business Advisor
Mindset Consulting

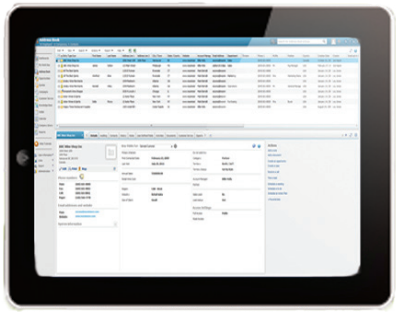
HIGHLIGHTS

- ***Schedule*** **updates and back-ups easily with cloud-based version and work from anywhere.**
- ***Manage*** **all client relationships in a proactive and exceptional way.**
- ***Create*** **consistency in client experience and make branding effortless.**
- ***Drive*** **all aspects of training delivery and project management.**

DELIVERING EXCEPTIONAL EXPERIENCES FOR CLIENTS

Mindset Consulting is a firm dedicated to helping financial professionals either fine-tune or re-engineer their financial advisory practices in order to achieve success in their highly competitive industry. When Sherri Ostropolski left her previous firm to launch her own consulting company, she needed to find a CRM solution that could be accessed via the cloud and was highly customizable. She also wanted to be able to recommend the same solution to her financial clients – Maximizer CRM Live and Maximizer Wealth Manager CRM fit both bills.

When Mindset begins working with individual Advisory Teams which are typically one-year engagements, Maximizer is used to ensure that the onboarding process for new clients is meticulously delivered. In order to fulfill training and coaching for these teams, Maximizer's Recurring Activities feature is used at Mindset to schedule meetings, input follow up summaries and set specific program checkpoints along the way. Mindset personnel work intimately with clients and Maximizer stores key information such as team members, core philosophies, strengths and weaknesses, and other details that can be accessed instantly and reviewed before every call.



TIME MANAGEMENT MADE EASY

The Mindset team finds it very helpful to set aside time at the end of every week to review the work week ahead by carefully looking at each day to see what is planned. Everything that needs to be completed is scheduled directly into the Calendar, and this enables all team members to see each other's schedules. The alarm feature is activated to easily distinguish between tasks on the Calendar that are time-bound such as meetings and action follow ups.

"WALKING THE TALK" WITH MAXIMIZER
Mindset also works with a select group of corporate clients in both the US and Canada and uses Maximizer to drive all aspects of project management and deliver training. Outlook Integration makes it easy to manage client communications directly through their Contact Records.

The feedback Mindset consistently receives from both private and corporate clients is that they clearly "walk the talk" in terms of what they are teaching them – to systematize and grow their businesses through the implementation of proactive best practices supported by people, processes and systems (CRM). Sherri recommends Maximizer Wealth Manager CRM to her clients which is already fully customized to the financial services industry.

About Maximizer

Maximizer CRM is fueling the growth of businesses around the world.

Our CRM solutions come fully loaded with the core Sales, Marketing and Service functionality companies need to optimize sales productivity, accelerate marketing and improve customer service. With flexible on-premise, our cloud and your cloud deployment options, tailored-to-fit flexibility, state-of-the art security infrastructure, industry-specific editions and anywhere/anytime mobile access, Maximizer is the affordable CRM solution of choice.

From offices in North America, Europe, Middle East, Africa and AsiaPac, and a worldwide network of certified business partners, Maximizer has shipped over one million licenses to more than 120,000 customers worldwide.

MAXIMIZER CRM

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