

MaxExpress Professional Services

MaxExpress CRM Live Jump Start

\$999

The MaxExpress CRM Live Jump Start Package will help you to get your team up and running quickly. Your expert CRM advisors will configure your system and provide the essential core training for your team to be successful.

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 between you and your Maximizer expert advisor to determine the level of assistance and best approach for your team.

Working with your Maximizer CRM expert advisor, the package consists of the following services:

- Business objectives capture session for the Maximizer CRM Live system.
- Identification of key processes to be supported by Maximizer CRM Live:
 - Naming conventions
 - Security needs and definition
 - Required data points
- Configuration based on the business objectives:
 - Set up of two (2) users
 - Addition of two (2) security groups, plus an all access administrator group
 - Assistance in creating 10-12 User-Defined Fields to track your businesses unique data points and shows how to set up default entries for quick data entry of standard information
 - Assistance creating two (2) new column view using one or more of the new User-Defined Fields
 - Addition of two (2) Custom Searches
 - Addition of one (1) Action Plans
 - Addition of one (1) Action Plan or 1 example Quick Email template
- Dedicated training time for your questions on how to best use Maximizer CRM in your environment:
 - Two (2) hour training session on the Maximizer CRM Live user interface
 - Access to two (2) modules of Maximizer CRM Online Training (self-directed)
 - Continuous knowledge transfer during the session from a Maximizer CRM advisor on best practices for using Maximizer CRM to allow you to make modifications independently going forward
 - One (1) pre-scheduled follow-up 15 minute phone calls with your CRM advisor over the following 30 days to answer any new questions
- Data Import
 - Import of data from a CSV (Excel) file with up to 30 fields and less than 10,000 records

MaxExpress CRM Live Options

Additional 2 hour Maximizer CRM Live User or Team Training Session	\$399
Conversion of on-premise Maximizer Database to CRM Live (< 2 GB)	\$499
Import of additional data from a CSV (Excel) file, up to 30 fields or less than 10,000 records of company, contact or opportunity data (Additional Data Import services are available. Please call for a quote)	\$299
24 hour rush installation	\$249

MaxExpress 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. Sessions are conducted virtually using Citrix Go to Assist to complete or equivalent.
4. Network access from the Internet must be available.
5. Documents excluded from Maximizer on-premise conversion option.
6. Additional Data Import services are available. Please call for a quote.

Maximizer Software
Simply Successful CRM

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