

TRAINING SESSION: 2

Powered by  **MAXIMIZER**CRM  
Wealth Manager

Thanks for your participation today!

Some of the key take-away's that you need to be mindful of include:

- ✓ The Maximizer button is two buttons in one – the upper half is a short-cut to save emails directly into the Notes section of the Contact (Address Book Entry); the lower half gives the option to save to the Address Book Entry, Save to Opportunity, or Save to Plan (which we won't use right now).
- ✓ When saving emails to Maximizer, it is best to save the entire email thread and can be done using the manual "Save to Maximizer" button. This will ensure the entire conversation has been captured in one Note under the Contact making it easier to find with less individual emails to sift through.
- ✓ Word integration is great for creating templates and creating mail merges for campaigns, KYC Updates, general client announcements, etc. Before you start in Word, be sure to:
  - Select the client names in Maximizer you want to include in your mail merge, ○ Once selected, use the "Make Selected List Current" under the Edit drop down box to see all of the clients you have selected.
  - Once in Word, go to the Maximizer menu to Insert applicable Merge Fields.
  - Preview the Letters using the Previous Entry and Next Entry buttons to go forward within selected clients.
  - Use the "Save to Maximizer" button in Word which will save a copy of the letter into each Contact.
- ✓ To set up an Action Plan for your clients, **manually apply** the appropriate Service Delivery level to **Household**, and can be done by choosing "Select an Action Plan" found under the Actions drop down menu.
- ✓ Once applied, Action Plan tasks are set up for 5 years with the last task reminding you to 'reapply' the Action Plan.
- ✓ New Client Advocate Process and Onboarding Process are also Action Plans that have been broken down into bite sized pieces and input into the system ready to be applied to each new or existing client.
- ✓ If clients upgrade or downgrade classifications, be sure to cancel any future tasks from the previous classification showing under the Activities Tab.

If you get stuck we are here to help!

