

# Guidelines for Your CRM

CUSO has chosen **Maximizer Wealth** as their preferred CRM Platform and they have worked hard to custom-build user-define fields, tabs, views, and Action Plans which support various aspects of the PSA Process.



## Common CRM Observations

Each CRM has their strengths and weaknesses, but one common observation is that most of them are hugely underutilized. Many CRMs completely systematize a business advisory practice by proactively automating all core business activities, creating complete client profiles, fully integrating email, and clearly delegating client service deliverables.

Another observation about CRMs is they can be overly robust, meaning they can be overwhelming and not very user-friendly. To that end, we've created a list of the core features we believe are important when advisory teams are choosing a CRM. We've also created several CUSO-specific Maximizer Training Sessions which are available on the CUSO Training Portal.

## Outlook Emails and Maximizer



To make things readily available to everyone on the team, we recommend centralizing as much information as possible on your CRM as it relates to each client relationship and is an important part of team communication. The more everyone uses the CRM to log tasks and notes as it relates to client needs – the fewer the emails jamming up your Outlook Inbox (which is often a struggle for most).

CRMs can and should be used to completely store and save all emails which are client facing and this can be done with the 'Send and Save' feature in Outlook once you activate the ability for Maximizer and Outlook to sync with each other.

It is very efficient to be able to see every email sent or received by a specific client in one place that the entire team can access versus in our individual Outlook folders and files. There are many inefficiencies that arise from information in various places and this is one good example of that – how many of us have spent too much time looking for an email we know we sent?

## Outlook Calendar and Maximizer

CRMs can also be used to sync with the Outlook Calendar which is often the main timed-scheduling tool for teams. Again, there is a specific feature you can activate to start using this feature.