



Global Insurance Company chose Maximizer, Just because we are well fit it this industry

One of the global leading companies in financial protection and wealth management chose Maximizer. The company was set up in early 19th century, which commenced in Hong Kong at 1986. They provide service for customer in every stage of their life by finding the right products and services in insurance, retirement, savings and investments best suited to their unique needs. They has transformed into multi-distribution channel to meet the challenge of the changing market.

Customer Relationship is the first priority

This financial service company aims to target the great potential China region market. In order to achieve this objective, they started using Maximizer Enterprise to help them in Customer relationship management two years ago. They understand that life protection and wealth management are the essential decisions made on everyone's life. As a result, customer would like to collect lots of information to deliberate what investment plan is the most suitable for them. This financial service company always puts their customer in top priority, they would like to use the **Sales Opportunity** function of Maximizer Enterprise to follow-up. This can reduce the time-cost due to customer always change their mind during the process of deliberation. After reaching a new stage of an investment or insurance project, they will input the most up-dated working progress in the sales opportunity. Every responsible colleague can view the status clearly.

Crystal Report© for Maximizer

Furthermore, this financial service company uses **Crystal Report©** which bundled in Maximizer to visualize the performance of every project in order to understand more about customers' need, so that they can customize the fittest financial and insurance planning to satisfy their customers. This **Crystal Report©** can also estimate that which project has the greater possibility to be success. It helps manager to better monitor the business.

Strategy library & Customer Service Module

This financial service company also uses strategy library to construct different strategic element aims to provide every customer unique opportunity. They can provide more efficient services to customers by obtaining the most accurate cost and duration of each opportunity. Besides, as a leading financial service company, they would like to keep record of every customer in the **Customer Service Module** of Maximizer Enterprise. This is not only to make sure that every colleague can follow-up each case easily, but also allow customers to view their own case. If they discover there is something wrong, they can contact them to do alteration immediately.

Be life confident

Regardless where customer is, this financial service company hopes that they can also provide service and product to their customer to make them “be life confident”. As a result, they use **Maximizer Enterprise eCRM** system that makes online working possible. With the help of eCRM, they can offer care, support with high flexibility and advice to customer without geographic boundary. Colleagues can provide the most suitable services and planning to their customers since they can search and update customers’ requirement through web-portal anytime everywhere. Brand loyalty can be maintained if customers’ need could be responded quickly. Better still, colleagues can send email to customers, view customers support cases and resolve incident directly using just the web-portal. Besides, they need to keep customer history in high confidential. Every Maximizer Enterprise user of this financial service company (no matter managers, staffs, or even customers) must login to web-portal or workstation with authentication to ensure that all the customer information would not exposed to the public or other unrelated person. It can help them to shows they are a prudent company to provide personalized service to every customer sincerely.