

TECH CHOICES



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Midmarket Sales Force Automation Scorecard Summary: Maximizer Software

Key Findings From "The Forrester Wave™: Midmarket Sales Force Automation, Q4 2005"

by **Liz Herbert**

with John Ragsdale and Jessica Harrington

EXECUTIVE SUMMARY

Maximizer Enterprise is a full CRM suite that spans sales, service, marketing, partner portals, and customer self-service. The product primarily appeals to small businesses looking for a lower cost, prepackaged solution that they can roll out quickly and easily. While Maximizer Enterprise provides most of the functionality required by the smaller end of the spectrum of small and medium-size businesses (SMBs), it lacks characteristics required by most large enterprises, such as flexible customization capabilities, segmented administration, and sophisticated graphics for KPI-driven dashboards.

MAXIMIZER ENTERPRISE: FULL CRM FOR THE SMALL BUSINESS

Canadian-based Maximizer Software has been pushing upmarket with its Maximizer Enterprise offering targeted at firms that are too large for the vendor's original contact management product. The vendor has more than 4,000 active customers on the Enterprise version and more than 1 million seats deployed on the contact manager. Approximately 50% of these customers are in North America, with the other 50% evenly split between EMEA and Asia Pacific.

Forrester evaluated Maximizer Software's current offering and strategy for on-premise sales force automation (SFA) against approximately 151 criteria (see Figure 1). The product provides a strong solution out of the box that is best suited toward companies and divisions with fewer than 100 employees that are:

- **Seeking easy-to-deploy, all-in-one CRM.** Maximizer Enterprise not only provides full CRM — sales, service, and marketing — but it also has partner management and customer self-service capabilities. Additionally, the solution includes support for managing a product library, storing sales collateral in a document tree, and generating quotes and invoices — all for no additional fees. On the downside, some features, such as visual representation of account hierarchies, require partner add-ons.
- **Looking for simple cost structure and an attractive price.** While firms pick SFA products based on features and compatibility with existing systems, price is usually an important factor in their decision, particularly in the small-business segment. At only \$489 per user and no additional server license fee, Maximizer Enterprise costs less than any other solution in this evaluation. The solution also has easy-to-understand pricing since it's not broken up into modules, and it includes most functionality — with the exception of the workflow tool — in that base price.

To see how Maximizer Software stacks up against seven other competitors, see the Forrester Wave™ evaluation of the on-premise SFA market.¹

Figure 1 Maximizer Enterprise Evaluation Overview

CURRENT OFFERING	
Product breadth	Maximizer Enterprise is a full CRM suite that includes sales, service, and marketing, as well as partner portals and customer self-service capabilities.
Deployment options	On-premise or hosted by partners.
Verticalization	Basic templates are available for sales, financial, real-estate, high-tech, home office, and legal industries.
Setup and configuration	Maximizer Enterprise provides strong out-of-the-box capabilities appropriate for smaller organizations and divisions, including the ability to manage user roles and access rights, set up sales methodologies, and store product information and sales collateral. However, the product lacks features required by most larger enterprises, such as segmented administration and advanced customization like custom-calculated fields or the ability to change the order of tabs and menu buttons.
Sales management	Maximizer Enterprise simplifies life for a sales user with its built-in calendar and to-do list, strong query tools, many-to-many relationship tracking, and ability to generate quotes and orders. On the downside, it lacks visual representation of account relationships, sophisticated deduping tools, and flexible forecasting features like built-in check boxes for forecast inclusion and the ability to store quotas.
Sales analysis	Maximizer Enterprise ships with Crystal as its reporting engine and includes more than 150 reports out of the box. Unlike some competitors that only include one report writer license per deployment, Maximizer Enterprise bundles a report writer with every seat, meaning that all users have the option of creating a custom report.
Usability	Maximizer Enterprise’s user interface makes it intuitive for reps to manage accounts and deals. Additionally, the product has built-in wizards to help users and administrators complete basic tasks. When stuck, users can rely on the help library or refer to training manuals for assistance.
Access	Maximizer Enterprise has 100% capability available in disconnected offline mode but limited support for real-time access through a mobile device.
Integration	Maximizer Enterprise integrates with popular calendar programs Outlook and Palm and well as popular email programs Outlook and Lotus. Prebuilt ERP integration is limited to QuickBooks, meaning that firms running other systems in the back office will have to do their own custom integration or rely on the vendor’s services.
Services	Maximizer Software offers a range of prepackaged and custom training options and a CRM audit for an additional fee.
Cost	At only \$489 per user and no additional server charge, Maximizer Enterprise is priced very attractively compared with other vendors’ offerings in this space.

Source: Forrester Research, Inc.

Figure 1 Maximizer Enterprise Evaluation Overview (Cont.)

STRATEGY	
Product strategy and vision	Maximizer Software has continued its focus on improving usability and enhancing Microsoft Office integration with its recently released Version 9.
Midmarket SFA commitment	Most Maximizer Enterprise customers use SFA; 95% are SMBs, while rest are divisions of large enterprises.
Sales and implementation strategy	Maximizer Software sells and services through both direct and indirect channels in the Americas and Asia Pacific and relies on partners in EMEA. The vendor has more than 400 channel partners worldwide.
Technology partners	Key technology partners include Business Objects, Microsoft, Intuit, RIM, and Pervasive.
MARKET PRESENCE	
Installed base	Maximizer Software has sold its Maximizer Enterprise product to 7,000 customers and has roughly 4,000 active customers who have upgraded or purchased in the past two years. Maximizer also sells a scaled-down version — a contact manager called Maximizer — which boasts more than 1 million deployed seats.
Financials	Maximizer Software only has \$16.5 million in annual revenue but has shown growth in its most recent fiscal year.
Number of employees	Approximately 170 employees.
Global reach	Maximizer Software generates approximately half of its revenue from the Americas region, one-fourth from EMEA, and one-fourth from Asia Pacific.

Source: Forrester Research, Inc.



Go online to download additional in-depth data and scores for this vendor and other vendors included in this Forrester Wave evaluation.



SUPPLEMENTAL MATERIAL

Online Resource

The underlying spreadsheet for Figure 1 is available online. The spreadsheet includes more detailed data and scores for this vendor.

This detailed data and scores for this vendor are also available online through an Excel-based vendor comparison tool that provides detailed product evaluations and customizable rankings.

Forrester Wave Methodology

We conduct primary research to develop a list of vendors that meet our criteria to be evaluated in this market. From that initial pool of vendors, we narrow our final list to those presented here. We choose these vendors based on: 1) product fit; 2) customer success; and 3) Forrester client demand. We eliminate vendors that have limited customer references and products that don't fit the scope of our evaluation.

After examining past research, user need assessments, and vendor and expert interviews, we develop the initial evaluation criteria. To evaluate the vendors and their products against our set of criteria, we gather details of product qualifications through a combination of lab evaluations, questionnaires, demos, and/or discussions with client references. We send evaluations to the vendors for their review, and we adjust the evaluations to provide the most accurate view of vendor offerings and strategies.

We set default weightings to reflect our analysis of the needs of large user companies — and/or other scenarios as outlined in this document — and then score the vendors based on a clearly defined scale. These default weightings are intended only as a starting point, and readers are encouraged to adapt the weightings to fit their individual needs through the Excel-based tool. The final scores generate the graphical depiction of the market based on current offering, strategy, and market presence. Forrester intends to update vendor evaluations regularly as product capabilities and vendor strategies evolve.

ENDNOTES

- ¹ SMBs continue to invest in SFA, and many seek an on-premise deployment rather than one of the increasingly popular software-as-a-service (SaaS) options. To assess the state of midmarket on-premise SFA applications and see how the vendors stack up against each other, Forrester evaluated the strengths and weaknesses of top midmarket on-premise SFA vendors across 151 criteria. This evaluation complements the April 2005 Forrester Wave evaluation of the hosted SFA market. The result: Siebel, Onyx, and Pivotal are best suited for larger firms, while FrontRange and Maximizer Software fit the needs of small businesses. Included in this report is an interactive vendor comparison tool that provides detailed product evaluations and customizable rankings. See the November 22, 2005, Tech Choices ["The Forrester Wave": Midmarket Sales Force Automation, Q4 2005.](#)

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