DRAFT

Max-Improvement-System

An ERP software alternative for manufacturers: ERP, CRM, process improvement and digital workers in one platform.

Enterprise Features at SMB Pricing **$1,999/month***

About half the cost of a typical big-name ERP + CRM combination‡

A full CRM and ERP is built into every app, with complete knowledge bases and databases. And a cohort of digital workers, our Digital Teammates, works inside every app with your team. Digital Teammates propose. Humans decide.

WHAT YOU ARE BUYING

What Max-Improvement-System is

One platform with CRM, ERP, knowledge bases and Digital Teammates built in, instead of stitching per-user ERP licenses to separate improvement tools and consultants. Max-Improvement-System runs sales, operations, planning and process improvement in one place, with SIOP, quality, VSM and VA/VE tools, including the full Max-VSM-Tool.

WHAT SETS IT APART

Two differentiators in every Max* app

CRM + ERP built in 1

A full CRM and ERP is built into every app, with complete knowledge bases and databases. The CRM and ERP sit inside the app, so your records and your work live in one place.*

Digital workers: Digital Teammates 2

A full cohort of digital workers analyze, recommend and teach. Your team makes the call.

Digital Teammates propose. Humans decide.

AT A GLANCE

What Max-Improvement-System gives your team

One platform

ERP, CRM, process improvement and digital workers.

Complete toolset

SIOP, Quality, VSM and VA/VE, including the full Max-VSM-Tool.

Keeps what you learn

The next project starts smarter.

Flat price

A flat $1,999/month*, backed by operating partners.

**The client pays the open-source ERP and CRM subscription directly when the software is implemented.*
‡Compared with a typical big-name ERP + CRM combination at list price. [PRICE SOURCE NEEDED]

DRAFT

HOW IT WORKS

Every project starts smarter than the last

Teams record how work is done, rank opportunities, run projects and keep what they learn, so the next project starts smarter.

RECORD how work is done ▶ **RANK** the opportunities ▶ **RUN** the projects ▶ **KEEP** what they learn ▶ **NEXT** starts smarter

Sales, operations, planning and process improvement, run in one place.

COMPLETE TOOLSET

SIOP, Quality, VSM and VA/VE tools in one platform

SIOP
Sales, inventory and operations planning.

Quality
Quality tools for the plant floor.

VSM
Including the full Max-VSM-Tool.

VA/VE
Value analysis and value engineering.

THE KNOWLEDGE BASE

Max-Knowledge: a full knowledge base with articles from all the best thought leaders

Every Max* app includes a full knowledge base with articles from all the best thought leaders, plus complete knowledge bases and databases inside the built-in CRM and ERP. Max-Knowledge is a digital knowledge and learning cycle, aligned with MEP's learning and knowledge sharing approach.

SENSE a signal arrives ▶ **DECIDE** a person chooses ▶ **ACT** work gets done ▶ **MEASURE** did it work? ▶ **LEARN** saved to the knowledge base

Every function runs a loop: sense, decide, act, measure, learn. Max-Knowledge keeps what each loop learns.

WHO IT IS FOR

Built for small and medium-sized manufacturers (SMMs)

Who uses it
Owners and leaders of small and medium-sized manufacturers (SMMs) who want ERP, CRM, process improvement and digital workers in one platform, at a flat price.

In every Max* app
CRM + ERP built in, with complete knowledge bases and databases.* A full knowledge base. Digital Teammates. Microsoft 365 integration live, Microsoft Copilot integrated via private connector; CRM/ERP data sync live.

Flat price, operating partners: a flat $1,999/month*, backed by 17 operating partners with 700+ years of plant experience. ERP software doesn't ship VSM or VA/VE methods or operating partners.

DRAFT

MICROSOFT 365 AND COPILOT

Microsoft 365 and Microsoft Copilot: live

Microsoft Copilot (Microsoft 365) is now integrated with the Max apps through a private connector, starting with Max-Sales-Marketing: use Copilot in Microsoft 365 to read and act on your Max data (meetings, files and tasks). The Microsoft 365 integration is live: Outlook, Teams, OneDrive, SharePoint, Excel and Planner. Microsoft permissions are designed to be least-privilege, with admin consent from your company.

Sign in with Microsoft	Single sign-on for every app, with admin and client views.	Live
Outlook mail + calendar	Log selected emails and meetings to the record they belong to. Read-only: nothing is sent from your mailbox.	Live
Teams	Meeting links on records, plus alerts for approvals and import results.	Live
OneDrive / SharePoint	Documents attach to records. Excel files open from and save to OneDrive.	Live
Excel	Import and export from your device or OneDrive/SharePoint.	Live
Planner / To Do	Two-way task sync with the project tasks in the app.	Live
Copilot	Integrated with the Max apps through a private connector, Max-Sales-Marketing first.	Max-Sales-Marketing first

Each record shows its Emails, Meetings, Files and Tasks from Microsoft 365 in a side panel.

DATA SYNC

Data sync: live

Data sync is live: reads and writes across CRM and ERP records, plus Excel import and export on every tab. Safeguards are designed in:

- A plain-language preview before any import, such as "12 rows ready, 2 need fixing"
- A before/after view of every change
- A blank never overwrites a value
- One-click undo
- Archive-only: nothing is deleted
- One audit log for every write

DIGITAL TEAMMATES

A cohort of digital workers, with your team in charge

Analyze

A full cohort of digital workers analyze the work and the data in the platform.

Recommend

They propose next steps. A person on your team approves.

Teach

They teach the methods, so the next project starts smarter.

Digital Teammates propose. Humans decide. Your team makes the call.

DRAFT

EVERYTHING YOU ARE BUYING

Max-Improvement-System: what is included

E-Commerce and Digital Marketing: online store and storefront, digital marketing campaigns, email and social	Included
Lead capture into the CRM: every web inquiry lands in the built-in CRM with an owner and a next step	Included
ERP, CRM, process improvement and digital workers in one platform	Included
SIOP, Quality, VSM and VA/VE tools, including the full Max-VSM-Tool	Included
CRM + ERP built in, with complete knowledge bases and databases*	Included
Full knowledge base with articles from all the best thought leaders	Included
Digital Teammates: a full cohort of digital workers that analyze, recommend and teach	Included
Backed by 17 operating partners with 700+ years of plant experience	Included
Microsoft 365 integration: Outlook, Teams, OneDrive, SharePoint, Excel, Planner	Live
Microsoft Copilot (Microsoft 365), via private connector	Max-Sales-Marketing first
Data sync across CRM and ERP records, plus Excel import and export on every tab	Live

$1,999/month*

Max-Improvement-System · About half the cost of a typical big-name ERP + CRM combination‡.
Enterprise Features at SMB Pricing.

THE MAX* FAMILY

Four apps, one Max-Knowledge System

Max-Sales-Marketing	**$499/month*, unlimited users**	The entry product into the Max-Knowledge System. Sales and marketing for manufacturers, with CRM + ERP built in.
Max-VSM-Tool	**$499/month***	From process video to value stream map, with CRM + ERP built in.
Max-Quality-Tools	**$799/month***	The QMS toolkit for manufacturers, with CRM + ERP built in.
Max-Improvement-System	**$1,999/month***	An ERP software alternative for manufacturers: ERP, CRM, process improvement and digital workers in one platform, including the full Max-VSM-Tool.

Digital Teammates propose. Humans decide. Our cohort of digital workers analyze, recommend and teach. A named person on your team makes every call and owns the outcome.

How to start: book a complimentary 30-minute discovery session.

We walk through your operation, show you Max-Improvement-System with the CRM + ERP built in, and agree where to start.

● sales@chilesand.co ● (828) 521-0297 ● biltmoremanagementadvisors.si ● gotbots.si