



# Business Intelligence

Maximizer CRM Reports & Dashboards are part of the integrated CRM Suite for Sales, Marketing and Customer Service & Support.

- Visualise crucial metrics at a glance to optimise performance
- Manage your business more effectively with rapid analysis of relevant information
- Empower managers with the ability to easily identify problem areas
- Spend less time reporting and more time moving business forward

*“With Maximizer CRM and Crystal Reports, we have visibility into our lead and project status, marketing programs, complaints, employee performance, and the sales revenue stream. This is helping our employees build valued relationships with our customers, plus the efficiencies and time savings we’re creating means additional resources can be allocated to other projects. This is increasing overall customer satisfaction.”*

Brooke McKissic, Senior IT Solutions Developer  
DNA Group

## Get visibility. Move business forward.

With a foundation of real-time business visibility, actionable insight is put into the hands of sales, marketing and service managers and executives. Solve problems, seize opportunities and refine everyday processes for more effective use of people, budget and time.

Maximizer CRM includes daily dashboards plus over 175 out-of-the-box reports including Crystal Reports® and Microsoft SQL Reporting Services (SRS) templates to make insight quantifiable, improving the bottom line.

### Faster, more quantifiable decision-making

With high-level, real-time snapshots of departmental and company performance, executives and managers gain the chance to adjust tactics, resources or follow-up for best-chance success. Pre-defined key performance indicators (KPIs) in the executive dashboard make insight highly visual and easily interpreted.

- Recognise trends and performance patterns across all customer-facing teams by continuously monitoring KPIs such as value & status of forecasted sales, daily service incidents, and campaign response.
- Personalise the dashboard to display the metrics most relevant to individual managers.
- Identify outstanding issues that need attention by automatically alerting executives when a metric reaches a critical high or low.

### Empower staff to react quickly

Maximizer CRM features over 175 built-in standard reports that gather and present real-time data on everything from sales forecasts and marketing campaigns to account activities and phone logs—for you to spend more time managing your business, and less time with the mechanics of running reports, including Crystal and Microsoft SRS templates.

- Get the right information with on-the-fly reports that enable you to sort and display data and results in charts or lists.
- Instantly export reports to Microsoft® Excel® for further analysis and data manipulation.
- Share reports with colleagues in various formats including PDF, Word, HTML and XML.



**Business Visibility with Maximizer CRM:**  
Monitor the metrics and reports you need to more effectively manage your business.



**Sales Management:** Gain greater visibility into the success of your business with sales forecast and pipeline reports, account activity reports, phone logs, and more.

## Customise metrics to your business processes

Extend out-of-the-box report templates and customise your own graphical and detailed reports with Crystal Reports® or Radius90 for Microsoft SQL Reporting Services (SRS)<sup>i</sup>.

- Create and edit your own reports to gain further insight into customer behaviors, new business opportunities and operational inefficiencies.
- Use the industry-leading Crystal Reports or new Radius90 for easy creation of Microsoft SRS reports compliant with Microsoft Report Definition Language (RDL) in an Office-like environment.
- Quickly and easily produce visual summary and drill-down reports with calculations and conditional formatting.
- Automatically send updated reports directly to decision makers on a regular basis<sup>ii</sup>.
- Uncover potential issues (recurrent service problems or poor sales performance), by setting up automatic alerts whenever metrics meet certain criteria<sup>iii</sup>.
- Compare and analyse with data in other applications such as accounting systems to get a complete view of relationship health and customer value.

## Schedule and deliver reports online with Crystal Reports Server<sup>iv</sup>

- Publish Crystal Reports to the web with a step-by-step publishing wizard.
- Reduce time spent manually running reports and offload resources to off-peak hours by automating reports to run at specific times. Schedule various output formats, including Excel, PDF, and RTF.
- Make sure the right people have access to the right information at the right time with robust security options.

## Key Reports Out-of-the-Box

Below are some of the key reports and dashboard key performance indicators (KPIs) provided with Maximizer CRM 10 out-of-the-box, to help you get the real-time visibility you need right away. Report templates are provided in Maximizer reports, Crystal Reports, or Microsoft SQL Reporting Services formats.

### **Sales, Order, and Account Management Reports & Dashboard KPIs**

- Opportunity pipeline (revenue by stage)
- Opportunity pipeline – by Leader, Team (weighted revenue)
- 30-60-90 Day Pipeline
- Pipeline report - Probability of Closing
- Win-Loss-Abandon analysis
- Sales Alert report (opportunities not closed)
- History (activities per opportunity)
- Forecast analysis
- Executive report (summary & details of sales by month/quarter)
- Opportunity column & detailed reports
- Account history/notes report
- Territory reports
- Phone log report
- New opportunities created
- Closed opportunities
- 30-60-90 Day Pipeline
- Value, weighted \$ of opportunities in progress
- Active sales quotes, expiring quotes

### **Marketing & Lead Management Reports & Dashboard KPIs**

- Lead summary – by account manager, status
- Campaign summary
- Campaign response
- Campaign detailed reports
- Campaigns in progress
- Abandoned, suspended campaigns
- Daily leads added

### **Customer Service & Support Reports & Dashboard KPIs**

- Overdue cases by queue, product, customer service rep
- Unassigned cases by queue or product
- Workload by customer service rep
- Case analysis by product, queue, origin, priority
- Case resolution analysis
- Case billing, assignments, monitor
- Customer Service & Support case column & detailed reports
- Knowledge Base summary & detailed reports

## Maximizer CRM 10 Features

- Account and contact management
- Time management
- Task management and automation
- Sales force automation
- Sales forecasting
- Marketing automation
- Email marketing
- Customer service management
- Microsoft Office integration
- Outlook & Exchange synchronisation
- Accounting integration
- Business Intelligence
- Workflow automation
- Partner relationship management
- eBusiness
- Access options: Windows desktop, web, mobile devices, remote synchronisation

### Technology Partners



### Certified Solution Provider



- Average # cases per rep
- Average resolution time
- Cases entered, abandoned, resolved today

### Time & Personal Management Reports

- Personal organiser (print schedules to daytimers)
- Hotlist Task check list
- Calendar print-out
- Appointment details
- Journal print-out
- Expense report

### Administration Reports

- User ID & installed workstations
- Sales, marketing team set-up
- User-Defined field summary
- List creation summary
- Database summary of entries, activities (to monitor size)
- Partner Access login (active partners)
- Customer Access login (active customers)

## Get Maximizer CRM today and get Simply Successful CRM

- i. Crystal Reports (full designer copy) and Radius 90 are both add-on products available through Maximizer Software with additional license fees.*
- ii. Requires Crystal Reports Server or Workflow Automation powered by KnowledgeSync, both add-on products with additional license fees.*
- iii. Requires Crystal Reports Server or Workflow Automation powered by KnowledgeSync, both add-on products with additional license fees.*
- iv. Crystal Reports Server is an add-on product with additional license fees.*

### Why Maximizer CRM 10

1. **Simple** and quick to deploy, learn, use and maintain.
2. **Access** to critical information through the web, Windows desktop, and mobile devices.
3. **Best value** in its class for full-featured CRM.

### Visit [www.max.co.uk](http://www.max.co.uk) for:

- Information based on your role: sales, marketing, service, executive, IT
- Information on features and technology
- Online demonstrations, trial software
- White papers on CRM best practices
- Webinars

Maximizer CRM helps small and medium-sized businesses maximise revenue, maximise satisfaction, and maximise every single day.

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