



# Business Intelligence

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

- Visualize crucial metrics at a glance to optimize 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
- Stay on top of team performance and make timely business decisions



## *Increase visibility. Drive business forward.*

Maximizer CRM delivers real-time business visibility and actionable insights for sales, marketing and service managers, as well as executives. Solve problems, seize opportunities and refine everyday processes for more effective allocation of resources, budget and time.

With Maximizer CRM's daily dashboards and more than 175 out-of-the-box reports — including Crystal Reports® and Microsoft SQL Reporting Services (SRS) templates — you have access to quantifiable insights that will improve your bottom line.

### Get big-picture perspective for rapid, sound decision-making

#### Dashboards & Alerts

With high-level, real-time snapshots of individual, departmental and company performance, executives and managers have the opportunity to adjust tactics, resources and follow-up activities for optimal success. Pre-defined key performance indicators (KPIs) in the dashboard offer highly visual, easily interpreted reporting views.

- Recognize trends and performance patterns across all customer-facing teams by continuously monitoring KPIs such as value and status of forecasted sales, daily service incidents, and campaign response.
- Personalize the dashboard by dragging and dropping metrics for yourself, your team or the company into your personal performance dashboard.
- Identify outstanding issues that need attention by automatically alerting executives when a metric reaches a critical high or low.
- See results at a glance with easy to visualize charts, guages, thermometers, and LED-style displays on your dashboard.

### Gain immediate business insight while on the road

#### Mobile Dashboards

Maximizer CRM Wireless Web Access puts critical business information at your fingertips with mobile dashboards and reports accessed through the web browser<sup>r</sup> on your smartphone.

- Monitor the status of your business and team performance at a glance, no matter where you are.
- Proactively review weekly reports without waiting for emails or returning to the office.
- Make timely decisions and take necessary action by staying better informed with real-time information.

### Empower staff to react quickly

#### Out-of-the-Box Reports & Templates

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 — allowing you to spend more time managing your business, and less time with the mechanics of running reports.

- 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.

“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



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

## Tailor metrics to your business processes

### Customized Reports

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

- 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 Microsoft SRS templates, and customize your own reports for your unique business requirements.
- 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>iii</sup>.
- Uncover potential issues (recurrent service problems or poor sales performance), by setting up automatic alerts to trigger whenever certain criteria are met.<sup>iv</sup>
- Compare and analyze with data across other applications such as your accounting systems to get a complete view of relationship health and customer value.

## Schedule and deliver reports online

### Crystal Reports Server<sup>v</sup>

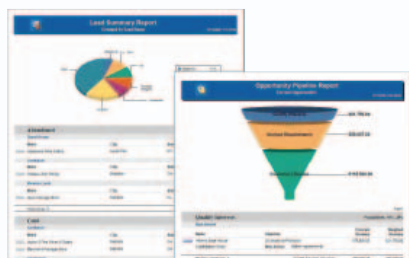
- Publish Crystal Reports to the web with a step-by-step publishing wizard.
- Reduce time spent manually running reports and offload resources to off-peak hours by automating reports to run at specific times. Schedule various output formats, including Excel, PDF, and RTF.
- Make sure the right people 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 10.5 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 (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
- Active sales quotes, expiring quotes



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

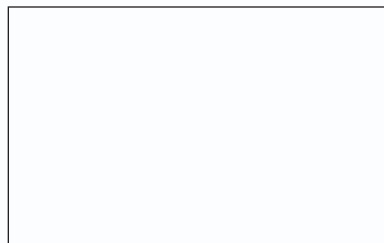
# Maximizer CRM 10.5 Features

- 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 synchronization
- Accounting integration
- Business Intelligence
- Workflow automation
- Partner relationship management
- eBusiness
- Access options: Mobile devices, web, Windows desktop, remote synchronization

## Technology Partners



## Certified Solution Provider



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

## Time & Personal Management Reports

- Personal organizer (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. Included in Maximizer CRM 10.5 Freedom release.
- ii. Crystal Reports (full designer copy) is an add-on products available through Maximizer Software with additional license fees.
- iii. Requires Crystal Reports Server or Workflow Automation powered by KnowledgeSync, both add-on products with additional license fees.
- iv. Requires Crystal Reports Server or Workflow Automation powered by KnowledgeSync, both add-on products with additional license fees.
- v. Crystal Reports Server is an add-on product with additional license fees.

### Why Maximizer CRM 10.5

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

Maximizer CRM helps small and medium-sized businesses maximize sales, customer satisfaction and profitability through increased business productivity and optimization of limited resources.

### Visit [www.maximizer.com](http://www.maximizer.com) for:

- Information based on your role: sales, marketing, service, executive, IT
- Information on CRM and Contact Management
- An overview of features and technology
- Online demos and free trial software
- White papers and webinars on CRM best practices

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