

Business Intelligence

Maximizer CRM 12

Reports & Dashboardsⁱ 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
- Stay on top of team performance and make timely business decisions



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

Real-time visibility into your business.

Strategise effectively and make informed business decisions with timely, accurate insight into your organization. Maximizer CRM 12 delivers real-time visibility and actionable insights through robust business intelligence right out of the box. It provides managers and executives with critical sales, marketing and customer service information at a glance.

Visual dashboards, in-depth metrics, and timely alerts and reports enable rapid and effective evaluation so you can take action. Capture the valuable information required to proactively adjust tactics to effectively manage day-to-day operations, refine processes, resolve potential issues and leverage opportunities. Optimise your allocation of resources, budget and time to drive revenue.

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

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

Wizard-Driven Dashboards

With real-time snapshots of individual, departmental and company performance, managers and executives can proactively adjust tactics, resources and follow-up activities to optimize success. Personalised views of key performance indicators (KPIs) offer highly visual, easily interpreted business metrics.

- Recognise trends and performance patterns across all customer-facing teams by continuously monitoring key performance indicators such as value and status of forecasted sales, daily customer service incidents, and marketing campaign response.
- Identify outstanding issues that need attention by automatically alerting managers or executives when a metric reaches a critical high or low.
- See results at a glance with easy to visualise charts, gauges, thermometers, and LED-style displays on your dashboard.
- Save time with quick and seamless setup and modification of dashboards by any user.
- Configure your own dashboards to display key performance indicators in formats of your choice and set up to update as often as needed.
- Enhance your insight further by drilling down to view the data behind the metrics in a detailed list that can be formatted, sorted and exported to Excel[®].

Formula User-Defined Fields: Calculated values for key performance indicators

- Rapidly analyse performance based on metrics automatically derived from existing information contained in user-defined fields.
- Save valuable time spent running reports and set up commonly-used formulas that pull information from other user-defined fields, to produce the specific metrics you need to see.



Dashboards: Create your own KPIs and monitor what matters to you and your business.

- Use arithmetic, text, date/time and logical functions to obtain a more in-depth profile of contacts, opportunities, service cases and marketing campaigns.
- Quickly analyse critical information such as financial values and potential sales opportunities.

Sales Opportunity Monitoring

- Manage your sales pipeline effectively and increase your close ratio by staying informed.
- Keep tabs on your biggest deals and most valued customers by staying alerted to important changes in their status.
- Determine what changes you need to be aware of and configure email notifications to be sent to you, and others that need to know, when a sales opportunity has been modified.
- Facilitate timely response and collaboration by keeping account managers and partners up-to-date so they can take effective action.

Gain immediate business insight while on the road

Mobile Dashboards

Maximizer Mobile CRM puts critical business information at your fingertips with mobile dashboards and reports accessed in real time through your smartphone.

- Monitor the status of your business and team performance at a glance, anytime, anywhere.
- View the same powerful dashboards that you use in the office, on your smartphone.
- 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.

Leverage built-in tools & functionality

Reports & Templates Out-of-the-Box

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 on 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.

Tailor metrics to your business processes

Customised Reports

Extend out-of-the-box report templates and customise your own graphical and detailed reports with Crystal Reports® or Microsoft® SQL Server Reporting Services (SSRS).

- Create and edit your own reports to gain further insight into customer behaviors, new business opportunities and operational inefficiencies.



Mobile Dashboards: Get real time data insights wherever, whenever.



Customised Reports: Create reports on what you want to analyse and how you want to analyse it.

- Use the industry-leading Crystal Reports® or Microsoft® SRSS templates, and customise 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.ⁱⁱ
- Uncover potential issues (recurrent service problems or poor sales performance), by setting up automatic alerts to trigger whenever certain criteria are met.ⁱⁱ
- Compare and analyse 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® Serverⁱⁱⁱ

- 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 12 out-of-the-box, to help you get the real-time visibility you need right away. Report templates are provided in Maximizer CRM 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

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

Maximizer CRM 12

Features:

- Account and contact management
 - LinkedIn® integration
 - Time management iCalendar integration
 - Task management and automation
 - Sales force automation & forecasting
 - Marketing campaign automation & management
 - Customer service management
 - Microsoft Office® integration
 - Outlook & Exchange synchronisation
 - Business Intelligence
 - Workflow automation
 - Partner relationship management
 - Access options: mobile devices, Web, Windows® desktop, remote synchronisation
- 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 number of 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)

i. Dashboards feature not included in Maximizer Entrepreneur 12 Edition.

ii. Requires Crystal Reports Server and Workflow Automation powered by KnowledgeSync, both add-on products with additional license fees.

iii. Crystal Reports Server is an add-on product with additional license fees

Technology Partners



Certified Solution Provider



Why Maximizer CRM 12?

The SAVVY choice

1. **Simple & Quick** to deploy, learn, use and maintain
2. **Access Options** through web, desktop and mobile smartphones
3. **Value.** Best Value for a full-featured CRM, low total cost of ownership
4. **Vision.** 25 years of expertise driving development
5. **Your Choice.** Deployment in the Cloud, Partner Hosted or On-premise.

Visit www.max.co.uk 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 test drive of software
- White papers and webinars on CRM best practices

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



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Maximizer Software

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