CRM for Business Intelligence

| MAXIMIZER CRM

Real-time visibility into your business

Strategize effectively and make informed business decisions with timely, accurate insight into your organization. Maximizer CRM 2015 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, easy to use Excel Reports, 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. Optimize your allocation of resources, budget and time to drive revenue.

With Maximizer CRM's wizard-driven dashboards, library of Excel Reports and more than 175 out-of-the-box Crystal Reports®[1] 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.

- Recognize trends and performance patterns across all customer-facing

KEY BENEFITS

- **Real-time information on what matters to you and your business**

- **Fully customizable dashboard indicators**

- **Indepth reporting with Crystal[1] Reports and Microsoft SRSS**

- **New Excel Report library**

- **Over 175 built-in standard report templates**

- **Drill into information via reports and dashboards**

- **Use one-click integration with Excel to conduct further analysis.**

[1] Crystal Reports Server is an add-on product with additional licence fees.

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 visualize 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
- Maximize rolling date options for greater dashboard configuration
- 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 analyze 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
- Use arithmetic, text, date/time and logical functions to obtain a more in-depth profile of contacts, opportunities, service cases and marketing campaigns
- Quickly analyze 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 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
- Tasks can be synchronized with Microsoft Outlook, for immediate response to business developments
- Make timely decisions and take necessary action by staying better informed with real-time information.

### Leverage built-in tools & functionality

Use the new Excel Reports tool to access a library of built-in report templates or create your own reports, that will update in real-time, allowing for instant data manipulation via pivot tables and graphs, providing enhanced pipeline intelligence.

The new Excel Reports offers a truly simplified means to access key business intelligence. With a library of pre-designed report templates, you can select one of these reports, which will automatically generate a spreadsheet, allowing you to manipulate the data using the commonly used Excel tool, including pivot tables and graphs.

- Maximize the ability to use or create Excel specialist spreadsheet reports for easy manipulation of the data
- Access the power and simplicity of using pivot tables to generate graphs for easy management information
- Benefit from real-time data from Maximizer in Excel, idea for Marketing Opportunity or Campaign analysis and customer service auditing
- Access the data source tabs for Sales forecasting, pipeline analysis, revenue management, stock availability and delivery or dispatch status of an order
- Create your own reports based on basic, key and user defined fields, by simply selecting the data fields to be included in the report, populating Excel tabs review.
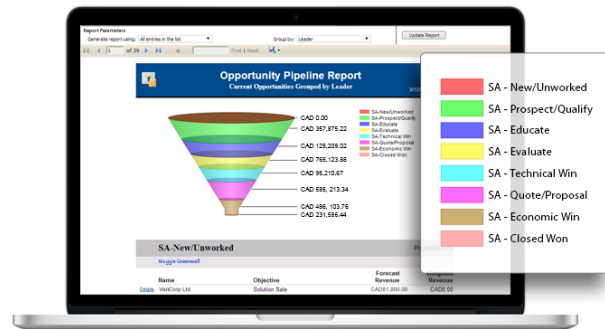
Reports & templates Out-of-the-Box

Maximizer CRM 2015 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 onthe-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 customize your own graphical and detailed reports with Microsoft SQL Server Reporting Services (SSRS) and Crystal Reports®[1].

- Create and edit your own reports to gain further insight into customer behaviors, new business opportunities and operational inefficiencies
- Use the industry-leading Microsoft SRSS 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[2]
- Uncover potential issues (recurrent service problems or poor sales performance), by setting up automatic alerts to trigger whenever certain criteria are met[2]
- 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[2]

- 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 Summer 2013 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 Reports1 or Microsoft SQL Reporting Services formats.

Sales, Order, and Account Management Reports & Dashboard KPIs

- New Excel Reports - Created Opportunities by Sales Rep
- New Excel Reports - Created Opportunities by Revenue
- New Excel Reports – Created Opportunities by Time
- New Excel Reports – Opportunities by Status
- New Excel Reports - Opportunities by Stages
- New Excel Reports - Opportunities by Product

[2] Requires Crystal Reports Server and Workflow Automation powered by KnowledgeSync, both add-on products with additional licence fees.

- New Excel Reports - Closed Opportunities by Sales Rep
- New Excel Reports – Closed Opportunities by Time
- New Excel Reports – Closed Opportunities by Revenues
- New Excel Reports - Opportunities Forecast
- 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

- New Excel Reports – Leads and Customers
- New Excel Reports – Leads by Status
- New Excel Reports – Leads by Time
- New Excel Reports – Campaigns by Categories
- New Excel Reports - Campaigns by Products/Services
- New Excel Reports – Open Rates and Click Through Rates
- New Excel Reports – Revenue and Budget Statistics by Campaign
- New Excel Reports – Campaigns by Revenue by Categories & Products/ Service
- New Excel Reports – Campaigns Revenue Trends
- 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

- New Excel Reports – Address book entries by Country Total
- New Excel Reports – Address book entries by Country & Account Manager
- New Excel Reports – Created and resolved Cased by Time
- New Excel Reports – Created Cases by Case Owner
- New Excel Reports - Resolved Cases by Case Owner
- New Excel Reports – Cases V Resolved Cases
- New Excel Reports – Cases by Product/ Services
- New Excel Reports – Cases by Priority
- Overdue cases by queue, product, customer service representative
- Unassigned cases by queue or product
- Workload by customer service representative
- 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 representative
- 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).

Build your own custom key performance indicators with Maximizer CRM dashboards, to gain instant insight into what matters to your business.

About Maximizer

Maximizer CRM is fueling the growth of businesses around the world.

Our CRM solutions come fully loaded with the core Sales, Marketing and Service functionality companies need to optimize sales productivity, accelerate marketing and improve customer service. With flexible on-premise, our cloud and your cloud deployment options, tailored-to-fit flexibility, state-of-the art security infrastructure, industry-specific editions and anywhere/anytime mobile access, Maximizer is the affordable CRM solution of choice.

From offices in North America, Europe, Middle East, Africa and AsiaPac, and a worldwide network of certified business partners, Maximizer has shipped over one million licenses to more than 120,000 customers worldwide.

Certified Consulting Partner

Adafi helps customers reach their business potential with Maximizer CRM in various business sectors, such as dredging, consulting, entertainment, sales & marketing, ICT, instrumentation, manufacturing.

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