



Business Intelligence for CRM

Identify Opportunity. Minimise Risk.

Key Benefits

- Visualise crucial performance metrics at a glance to optimise your business
- Make effective, timely decisions based on rapid analysis of relevant information
- Empower managers with the ability to easily identify problem areas
- Spend less time reporting, more time managing

“With Maximizer Enterprise 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

Without real information from which to make strategic decisions, managers are left flying blind. Use proven business intelligence technology to gain actionable insight into corporate performance so you can guide processes and people effectively. Maximizer Enterprise 9.5™ delivers the quantifiable insights necessary to minimise risk and improve your bottom line.

This proven CRM solution includes Crystal Reports® XI Professional, the world standard in business intelligence from Business Objects®. By turning customer, sales, marketing, and service data into meaningful information, you can effectively create winning strategies, improve business processes, and strengthen customer and partner relationships.

Make Better Decisions Faster

- Provide executives and managers with high-level, real-time snapshots of departmental and company performance. Visualise pre-defined key performance indicators (KPIs) in the Executive Dashboard¹.
- Understand business drivers better by continuously monitoring KPIs such as value & status of forecasted sales, daily customer service activities, and campaigns in progress.
- Personalise the Dashboard to display the critical real-time metrics different managers need to run their department effectively. Even create individual dashboards for sales representatives to monitor their own performance.
- Identify areas of your business that need immediate attention by setting up alerts to notify executives when a KPI reaches a critical level.
- Customise your dashboard with data from your other SQL Server applications.

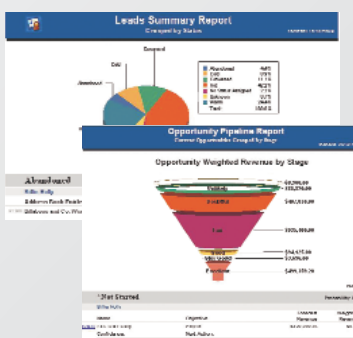
Focus On Decision-Making & Action

- Maximizer Enterprise features over 175 built-in standard reports to gather and present the detailed real-time data on everything from sales forecasts and marketing campaigns to account activities and phone logs.
- View and print detailed information in different ways without creating multiple reports. Flexibly choose from different views to sort data and display the results however you want in charts or lists.
- Instantly export report data to Microsoft® Excel® for further analysis and manipulation.
- Publish reports to colleagues in various standard formats, including PDF, Word, HTML and XML.
- Spend more time analysing and responding intelligently to real-time data and less time running regular reports for your staff and department.
- For administrators, use the system reports to monitor the status of your database.



“With Crystal Reports embedded in Maximizer Enterprise, our sales team can run customer reports on their own without relying on the head office. They can generate detailed customer profiles, interact with their contacts more quickly, and create stronger client relationships.”

*— Cam Buschel, Sales Analyst,
StemCell Technologies*



Reports: Gain greater visibility into your business with over 175 pre-formatted reports.



Key Indicators Dashboard: Instantly visualise crucial performance metrics for each business area.

- Some sample reports and analysis will give you an idea of the breadth of information you can access and use to advantage in your role as sales, marketing or customer service & support manager.

Business Intelligence for Sales

- ✓ View a graphical presentation of your forecast with the Opportunity Pipeline Funnel Report; a summary of leads with the Lead Summary Report; and conduct win/loss analysis at the click of a button.
- ✓ Build sales forecasts with probability of close rates based on success factors and decision-maker ratings, rather than on the ‘gut feel’ of sales people.
- ✓ Use an interactive organisational chart view of your prospects to understand roles of decision-makers and influencers.

Business Intelligence for Marketing

- ✓ Generate accurate ROI information for marketing campaigns based on the actual revenue from sales opportunities closed.
- ✓ Evaluate which programs show measurable sales results by tracking leads, opportunities and conversion rates.
- ✓ Identify opportunities for product improvement or development by analysing customer feedback.

Business Intelligence for Customer Service and Support

- ✓ Identify areas for customer service improvements by monitoring case resolution times and tracking overdue cases.
- ✓ Compare staff service calls to effectively balance case loads.
- ✓ Analyse repeat problems and use them to guide business improvements.

Identify Business Challenges & Opportunities

- Create and edit your own reports with Crystal Reports’ Expert Tool to gain further insight into customer behaviours, new business opportunities and operational inefficiencies.
- Quickly and easily produce reports in cross-tab, drill-down and summary formats. Add user-defined calculations, set up conditional formatting to highlight exceptions, and include charts and objects for visual representations.
- Automatically send updated reports directly to decision makers on a regular basis, or trigger them to run when specific, critical actions take place, using Maximizer Enterprise Workflow Automation.
- Uncover potential business challenges, such as recurring customer service problems or poor sales performance, by setting up automatic alerts whenever data meets certain criteria.
- Compare and analyse data in other database applications, such as your accounting or ERP systems, against the data in Maximizer Enterprise to get a complete view of your customer relationships and value of customers over their lifetime.
- Access reports from the web-based Employee Portal for quick access to information from anywhere.

Create, Manage, and Deliver Reports Over the Web

- With Crystal Reports Server³, easily publish Crystal reports to the web with a step-by-step publishing wizard.
- Reduce time spent manually running reports and offload report resources to off-peak hours by setting up reports to run at specific times. Even schedule various output formats, including Excel, PDF, and RTF.
- With interactive report viewers, print, export, and drill down on charts, and conduct conditional searches within reports over the web.
- Make sure the right people have access to the right information at the right time - Crystal Reports Server includes robust security options for user, group, object, and folder levels.

Dig Deeper with Crystal Analysis[®]

- Understand performance variation by viewing consolidated summaries and multiple views of complex data with Crystal Analysis⁴.
- Discover and understand trends, perform historical comparisons.
- Use Crystal Analysis’ Expert Tool with guided workflows to calculate statistics. Spot trends by adding variances, moving averages and trend lines.

1 Executive Dashboard available only in eCRM Suite.

2 Reporting on databases other than Maximizer Enterprise requires additional licenses of Crystal Reports, available through Maximizer Software.

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

4 Crystal Analysis is an add-on with additional license fees.



9 Reasons that make Maximizer Enterprise Better.

- Award-winning, intuitive, integrated sales, marketing, customer service & support CRM software
- Adaptable to your business demands
- On demand access: Desktop, PDA & Web-Ready
- Rapid deployment & results
- Works with Office, Outlook®, and accounting programs
- Bullet-proof security
- Architecture built on industry standards
- Affordable: Lowest total cost of ownership in its class
- Proven with over 7,500 customers and over 10 years focused on customer management software

For More Information

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Maximizer Enterprise 9.5

Designed for small and medium-sized businesses, Maximizer Enterprise 9.5 rapidly helps companies gain strategic insights and implement winning strategies that will out perform competitors. This proven, affordable CRM solution gives sales, marketing and service professionals the tools they need to attract prospects, win new customers and increase repeat business.

About Maximizer Software

Maximizer Software has helped over 7,500 Maximizer Enterprise customers and more than one million Maximizer users grow their businesses by building profitable customer relationships with award-winning solutions.

Maximizer Enterprise works with technology from the following partners



Awards



Authorised Maximizer Partner

Maximizer

The CRM Company www.max.co.uk

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