Introduction to Maximizer Insights

Bringing Powerful Business Intelligence
integrated straight into your
Maximizer CRM

FROM REPORTING TO INSIGHT

CRM has come a long way in 25 years. Once a tool that merely provided simple contact management with basic reporting, CRM now represents an essential business nerve centre, integrating lead management, sales, marketing and customer support efforts.

Maximizer has now taken this to another level altogether. Leveraging industry-leading business analytics technology, **MAXIMIZER**CRM **Insights** equips you to unleash the power and fully realise the value of your customer data…in real-time.

Discover anomalies, see the gaps, compare results on your terms and timelines…and start taking action faster than your competitors.

SPEND TIME MAKING AN IMPACT, INSTEAD OF SPREADSHEETS
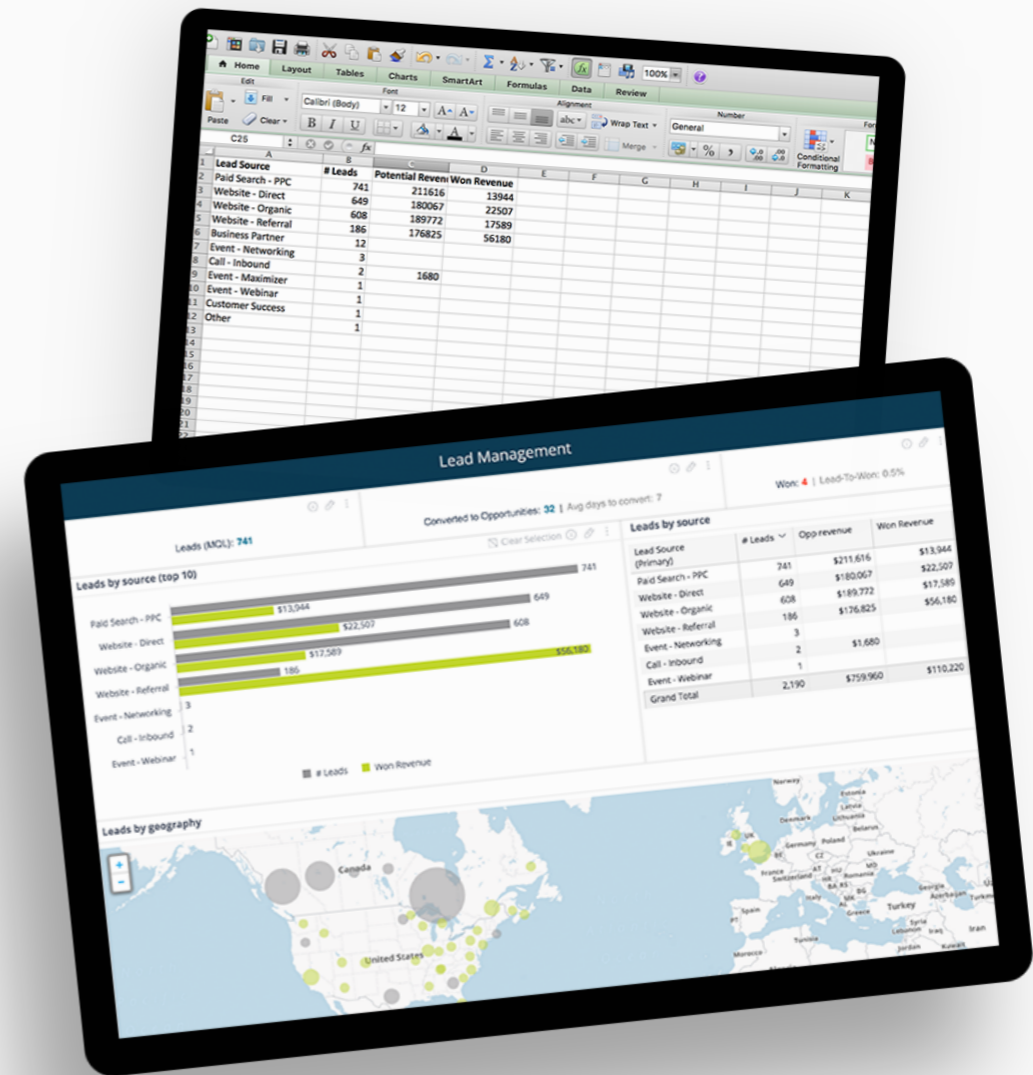
Your time is a valuable resource.

Use **MAXIMIZER**CRM **Insights** to reallocate that resource. Shift from spending several hours per week reporting to evaluating and adapting to new customer data perspectives.

In short, start focusing on work that creates value.

You no longer have to be an Excel genius to get the results you want. Leverage our built-in calculations and unique point-and-click reporting templates to create dynamic data visualisation...in minutes!

No more exporting into Excel, downloading, or re-importing. Seize back that time you spend each week manipulating data manually.

Instead, spot opportunities faster, call the right prospects sooner, renew more at-risk customers, and coach your team to be more impactful than ever.
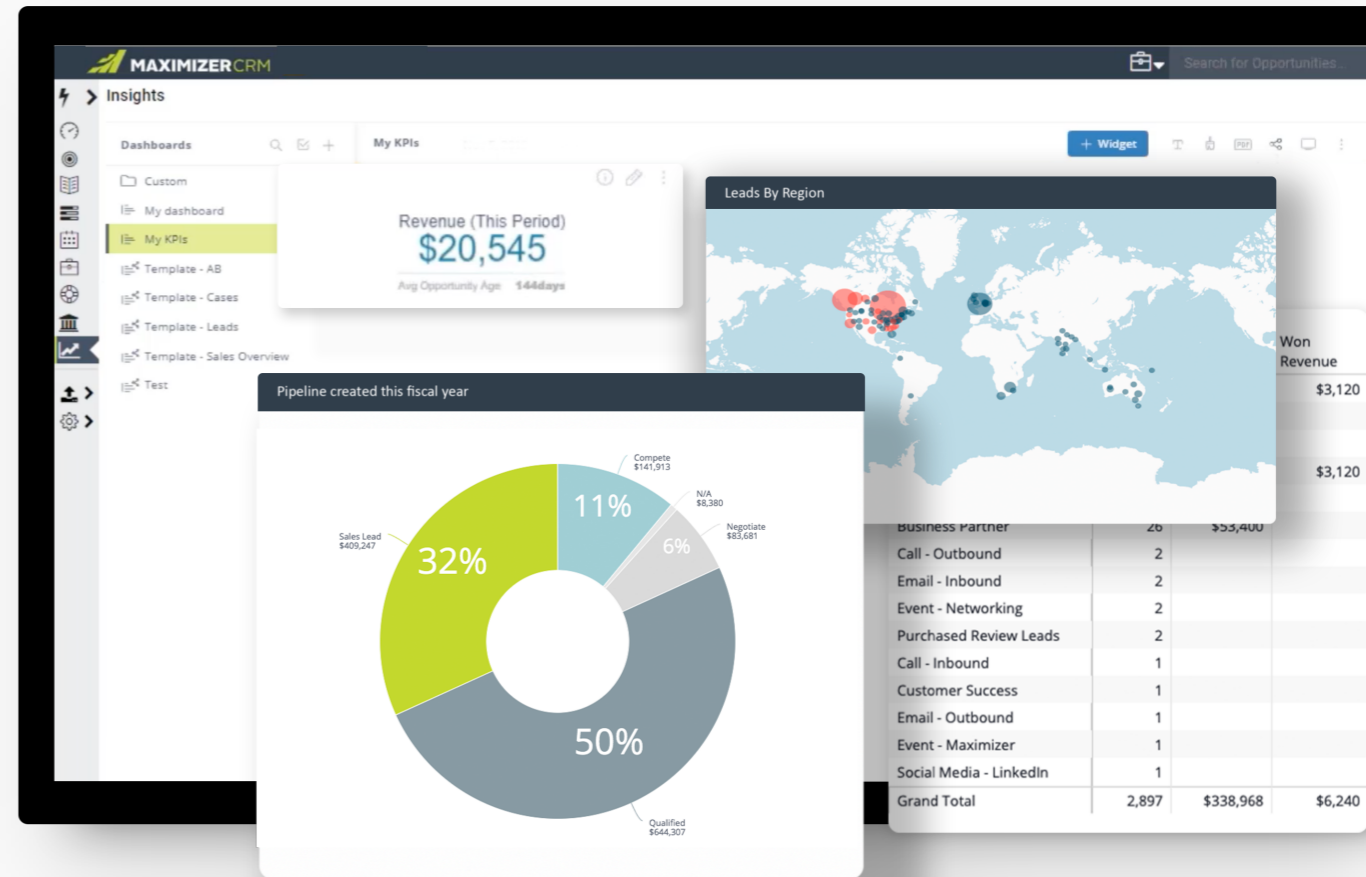
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VISUALISE YOUR DATA

A picture is worth 1000 words. Seeing your data represented visually allows you to consolidate thousands of data points, giving you the visual cues to process changes in revenue or act on target gaps.

Choose from one of our unique templates, or design one of your own.

Whether you want to see your progress in a pie chart, line chart, pivot tables, heat maps, polar charts, or world maps...from simple to complex, there is a **MAXIMIZER**CRM **Insights** reporting widget to match the type of analysis you need.

Oh, and you're not stuck with that first view. Simply point and click to update a report and filter for things like date range, location, lead source, or sales rep.
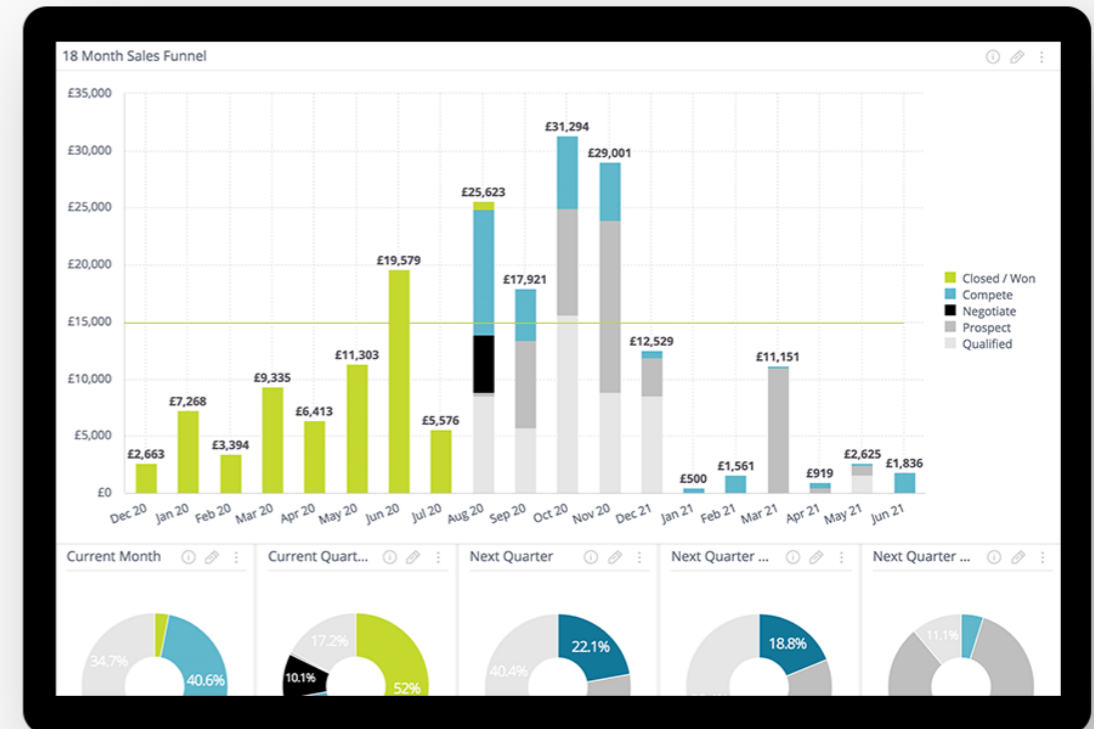
YOUR COMMAND CENTRE

"...So much more than a CRM dashboard."

Your customers need you to move at the speed of "now". This means you don't have time to manually gather data every day from multiple sources, collate it into spreadsheets and then grapple with pivot tables to uncover the story behind the numbers.

Instead, create custom reports in mere moments that let you evaluate the big picture, drill down to the details and measure everything in between... and then take action.

MAXIMIZERCRM **Insights** works seamlessly within our **MAXIMIZER**CRM software to analyse data, optimise choices, coach your team and grow your business...all within one fully integrated solution.
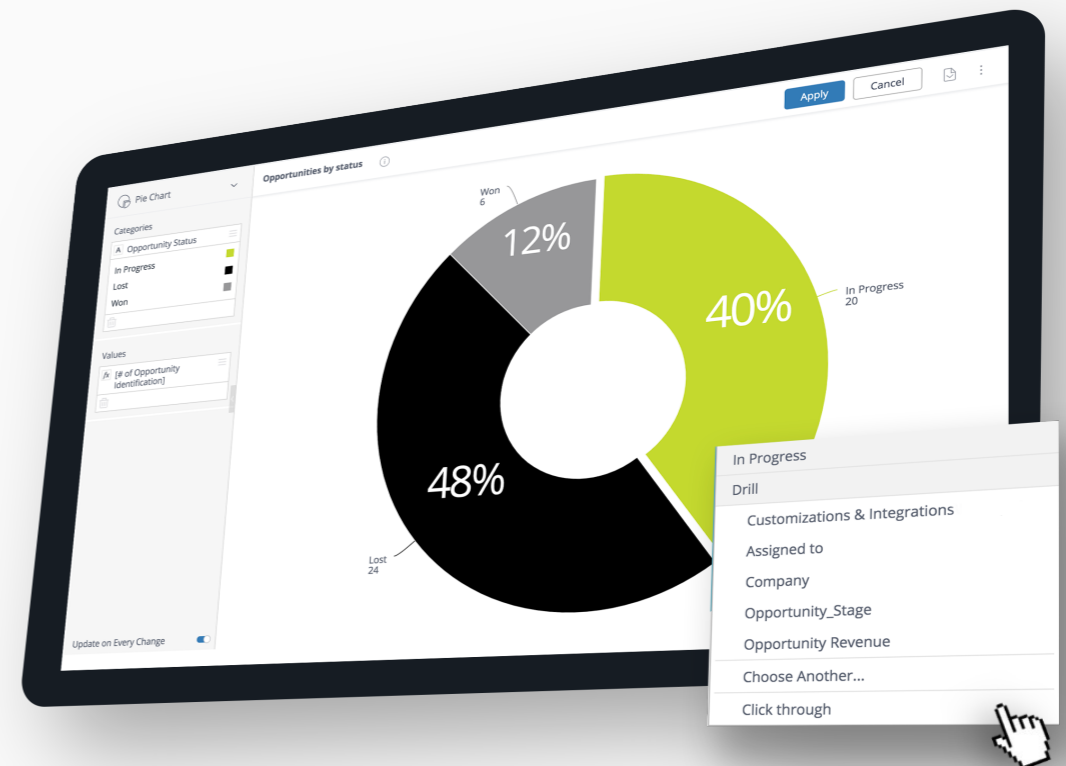
Ready for take-off?

THE ESSENTIALS

– Drill Down

Right-click to go from seeing the big picture to the smallest of details; easily and seamlessly. Don't want to see sales leads by country? Click to see leads by city, or by sales rep, or other views that meet your needs of the moment.

– Click Through

Once you have locked onto an opportunity, or a segment you want to analyse, a simple click takes you to the detailed records in the Address Book, Opportunities or Cases.
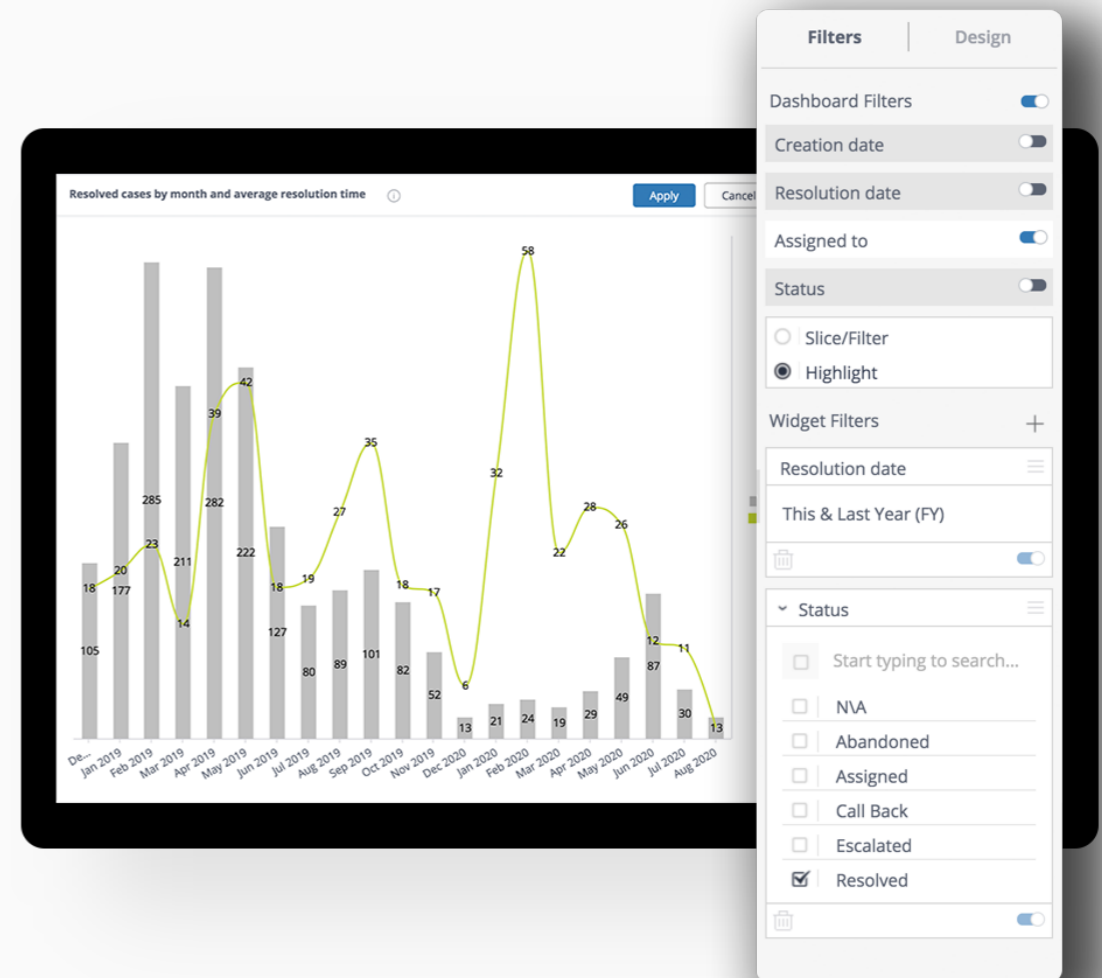

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THE ESSENTIALS

– Export & Share

Improve collaboration within the sales team, or across departments by sharing full dashboards, or just a widget. No more screenshots needed. Easily export them, or email them to others in formats including PDF, CSV, PNG, or XLS.

– Filters

Have more questions on a data view? Apply new filters with a couple of clicks. Specify new data sets and set new conditions - like filtering by a sales rep and a date range. Save time on frequently measured KPIs, and toggle filters on and off as needed. Apply to the entire dashboard or just one widget.
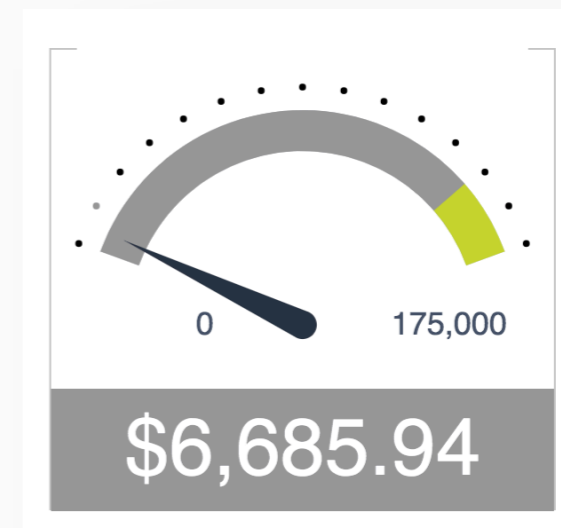
THE RIGHT CHART FOR THE RIGHT METRIC

– Pivot Table

Need to summarise large amounts of data? Go beyond any pivot table capabilities you've experienced in Excel. No more copy/paste errors, nor updating an outdated version. Get a centralised, accurate summary with built-in formulas. Best of all, simply click through to see the record details.

Happiness Table Metrics

Happiness ^ Rank	Region	Country	Total Population	GDP per Capita	Health Life Expectancy	Trust in Government
1	North Europe	Norway	5,353,363	1.62	0.80	0.32
2	North Europe	Denmark	5,754,356	1.48	0.79	0.4
3	West Europe	Iceland	337,780	1.48	0.83	0.15
4	West Europe	Switzerland	8,544,034	1.56	0.86	0.37
5	North Europe	Finland	5,542,517	1.44	0.8	0.38

– Indicator

Think of it as your speedometer of growth. Gauges give you an instant and compelling visual snapshot of how the health of a value compares to its target, like a sales rep's current pipeline versus quota. You can also add secondary indicators to give more context, like how many deals comprise the total forecast revenue.

0   175,000

$6,685.94

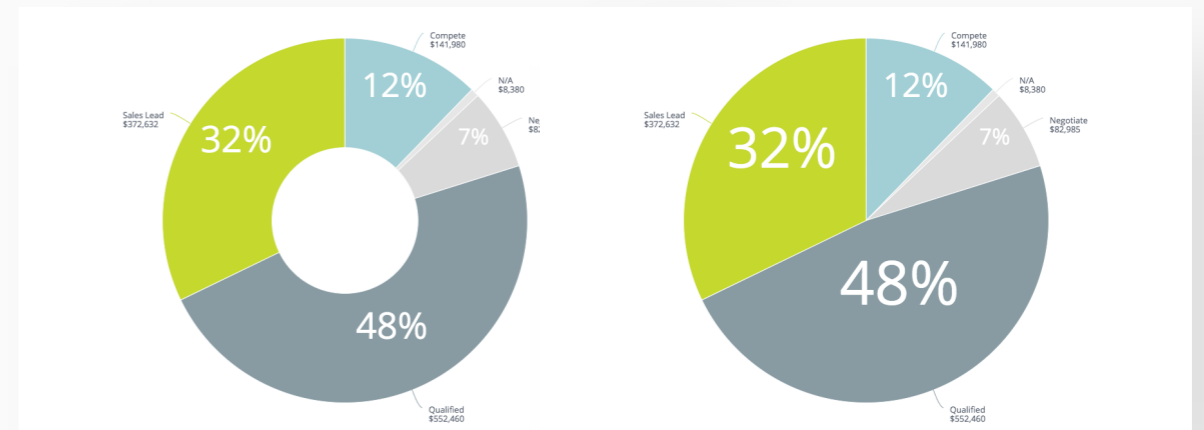**collier pickard**
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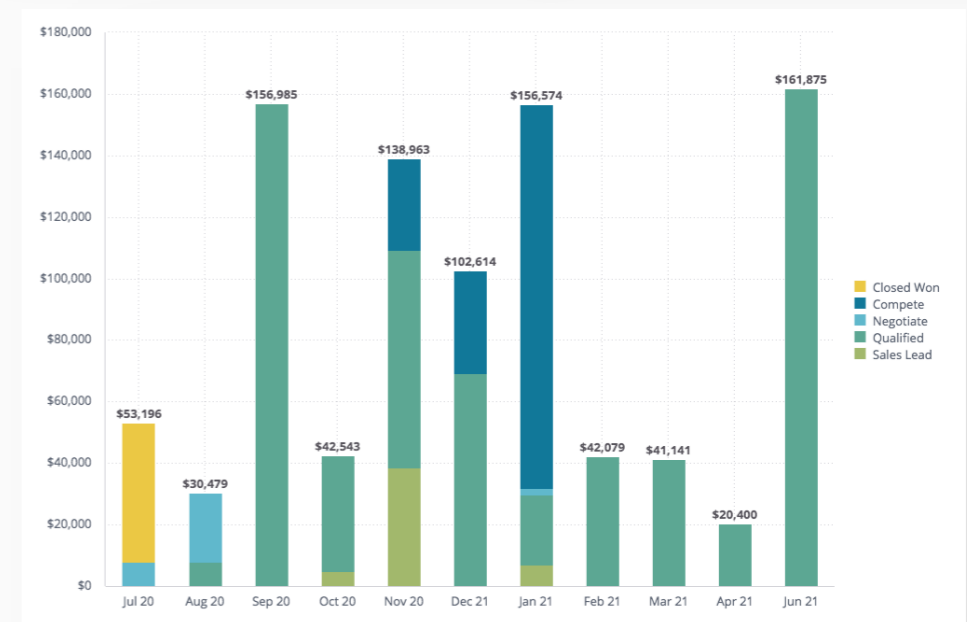
EFFORTLESS COMPARISONS

– Pie Chart

Classic, donut or ring options. We suggest using pie charts to plot information where you want to compare proportions and donut charts to focus on the lengths of the arcs.
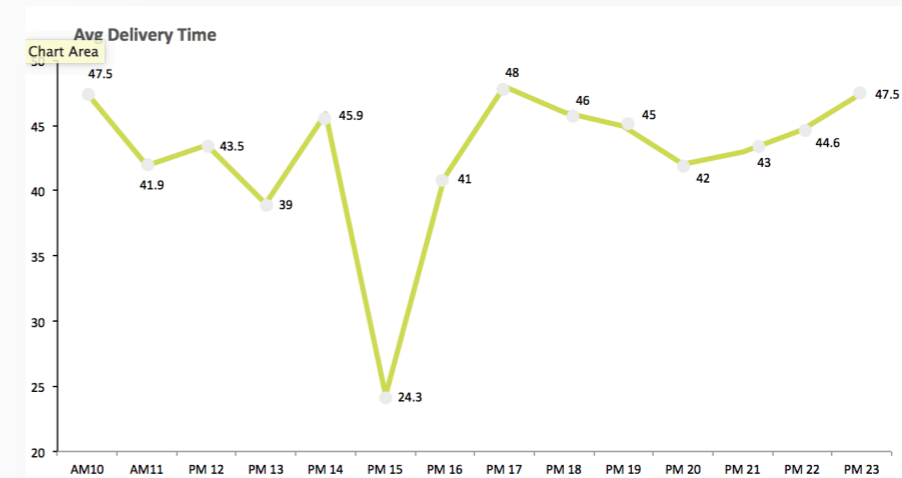
– Column & Bar Charts

Want to compare multiple values against a single dimension, like your top 10 customers by revenue? No problem. You can also "stack' the charts to add multiple dimensions, like showing the ratio of leads within a stage. You can even add in a target line to benchmark the team.
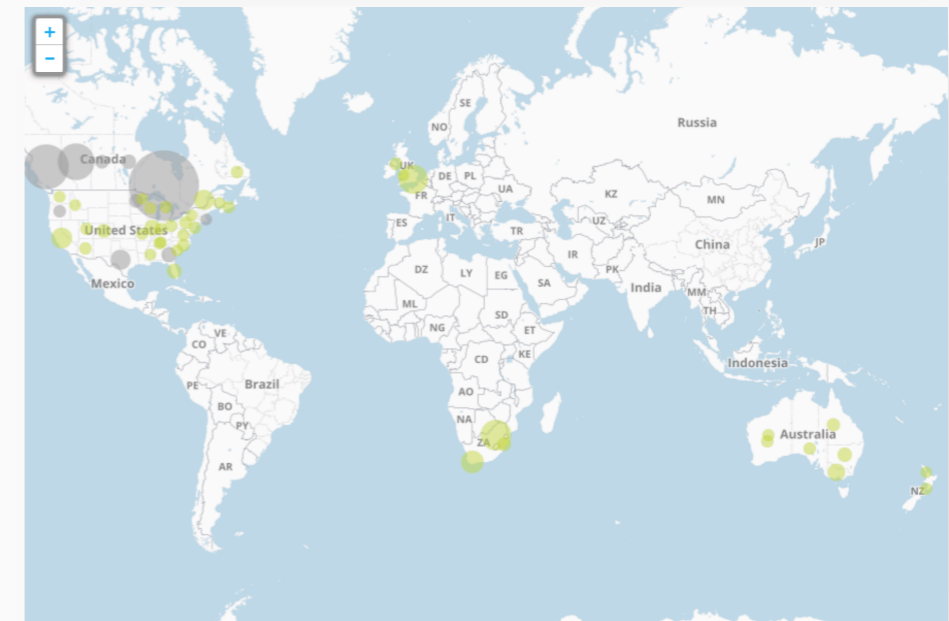
TRENDS & CORRELATIONS...A CLICK AWAY

– Line Chart, Scatter & Heatmaps

Discover trends, spot clusters or patterns and start linking your data points with scatter charts. Use heatmaps for an immediate look at performance anomalies and outliers.

– Geographic Map

See where your top customers are coming from, by city or country. Spot the next market, or plan new marketing initiatives in your best geographic regions.

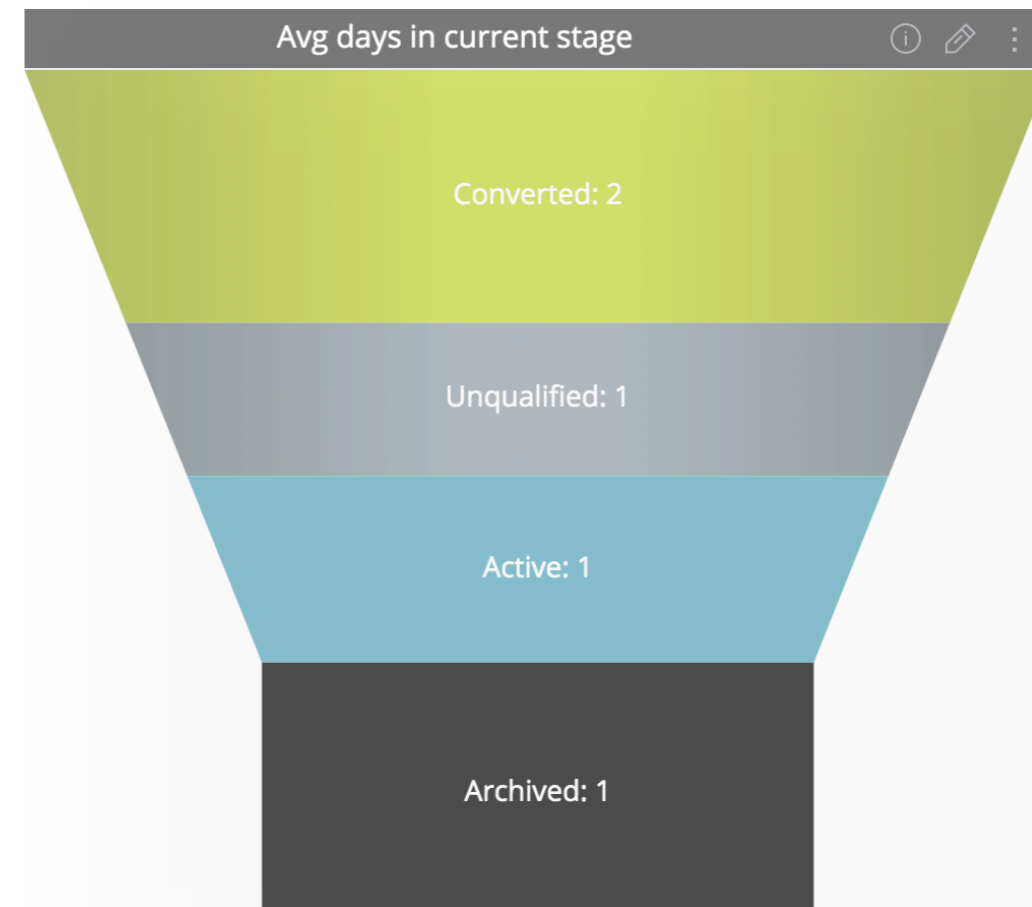
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GET IN THE (WORK)FLOW

– Funnel Charts

Track the various sales and forecast stages in your pipeline, or the current average time spent in each stage, or customer case resolution times, or other areas where workflows matter to your bottom line.

– We're just getting started

Compelling views of your data are limited only by your imagination. **MAXIMIZER**CRM **Insights** empowers you to explore through treemaps, sparkles, bump charts, Sankey diagrams, waterfall, box and whisker, histogram, word clouds, sunburst and polar charts.

We've got you covered for all your reporting needs.

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MAXIMIZE YOUR INSIGHT

Leveraging our legacy as a pioneer in CRM technology, we designed **MAXIMIZER**CRM **Insights** to help businesses visualise data, make decisions and take action faster than any other CRM in the world.

Use **MAXIMIZER**CRM **Insights** as your daily launchpad to drive data-driven decisions, and then watch your company grow.

Our team is available at any time to discuss your needs or answer questions. Or if you would like to dive right in with a trial, click below!

Try Free

Certified Solution Provider

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Collier Pickard has been providing CRM systems for over 20 years. We provide a professional, friendly and helpful environment in which our experienced team can work with you through every stage of the life of your CRM system.

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