



**Altimum IMS**

Customer relationship management (CRM)  
Business Intelligence



## Altimum IMS - Documentation Center

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**Author :** Maximizer Software Inc  
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**To Contact Us**  
**514 593-0865**



**[Info@altimumims.com](mailto:Info@altimumims.com)**

### **ALTIMUM IMS**

2160, boulevard Rosemont  
Suite 200  
Montréal (Québec)  
H2G 1T4



# Business Intelligence for CRM

## Identify Opportunity. Minimize Risk.

### Key Benefits

- Visualize crucial performance metrics at a glance to optimize 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 accordingly. Maximizer Enterprise 9™ delivers the quantifiable insights necessary to minimize risk and improve your bottom line.

This proven CRM solution includes Crystal Reports® XI Professional, the industry-leading business intelligence tool 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. Visualize pre-defined key performance indicators (KPIs) in the Executive Dashboard.
- Understand business drivers better by continuously monitoring KPIs such as value & status of forecasted sales, daily customer service activities, and campaigns in progress.
- Personalize the Dashboard to display the critical real-time metrics different managers need to run their department effectively.
- Identify areas of your business that need immediate attention by setting up alerts to notify executives when a KPI reaches a critical level.

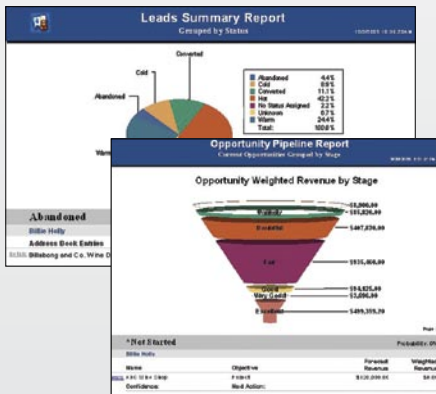
### Focus On Decision-Making & Action

- Maximizer Enterprise 9 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 group and 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 analyzing and responding intelligently to real-time data and less time running regular reports for your staff and department.
- Some sample reports and analysis will give you the idea of the breadth of information you can access and use to advantage in your role as sales, marketing or customer service & support manager.

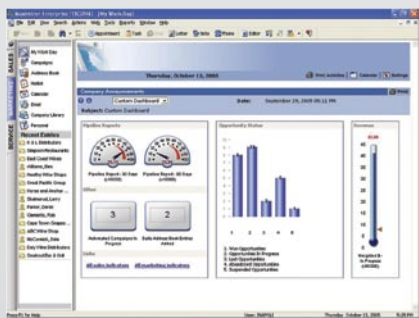


*“With Crystal Reports embedded in Maximizer Enterprise, our sales team can run customer reports on their own without relying on the head office. They can generate detailed customer profiles, interact with their contacts more quickly, and create stronger client relationships.”*

– Cam Buschel, Sales Analyst, StemCell Technologies



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



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

### 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 salespeople.
- ✓ Focus efforts on highest probability opportunities to increase sales.

### 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 new product development by analyzing customer feedback about desired enhancements.

### Business Intelligence for Customer Service & Support

- ✓ Identify areas for customer service improvements by monitoring case resolution times and tracking overdue cases.
- ✓ Compare staff service calls to effectively balance caseloads.
- ✓ Analyze 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 behaviors, 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 analyze data in other database applications, such as your accounting or ERP systems, against the data in Maximizer Enterprise 9 to get a complete view of your customer relationships and value of customers over their lifetime.
- Access more reports from the web-based Employee Portal for quick access to the information you need to drive your company to success.

## Create, Manage, and Deliver Reports Over the Web

- With Crystal Reports Server add-on, 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 or based on specific events. Even schedule various output formats, including Excel, PDF, and RTF.
- With interactive report viewers, print, export, and drill down on charts and other report objects, 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 the add-on Crystal Analysis.
- Discover and understand trends, perform historical comparisons and pinpoint significant aspects of your business process that might require tuning.
- Use Crystal Analysis' Expert Tool with guided workflows to calculate statistics. Spot trends by adding variances, moving averages and trend lines.

<sup>1</sup> Reporting on databases other than Maximizer Enterprise requires additional licenses of Crystal Reports, available through Maximizer Software.



## For More Information

Contact Maximizer Software  
**1-800-804-6299**  
sales@maximizer.com

Locate a Certified Solution Provider

**1-800-624-4153**

### Americas

604-601-8000 phone  
604-601-8001 fax  
info@maximizer.com  
www.maximizer.com

### Asia

+ (852) 2598 2888 phone  
+ (852) 2598 2000 fax  
info@maximizer.com.hk  
www.maximizer.com.hk

### Australia/New Zealand

+61 (0) 2 9957 2011 phone  
+61 (0) 2 9957 2711 fax  
info@maximizer.com.au  
www.maximizer.com.au

### Europe, Middle East & Africa

+44 (0) 1628 587777 phone  
+44 (0) 1628 587778 fax  
info@max.co.uk  
www.max.co.uk

## What Makes Maximizer Enterprise Better?

- One fully integrated product that's easy to use
- Superior flexibility, easy to configure & customize
- Rapid implementation, simple to administer
- On demand access: Desktop, PDA & Web-Ready
- Integrates with Microsoft® Office and Outlook®, plus leading accounting programs
- Bullet-proof security
- Architecture built on industry standards
- Low total cost of ownership

### Maximizer Enterprise 9

Designed for small and medium-sized businesses, Maximizer Enterprise 9 rapidly helps companies gain strategic insights and implement winning strategies that will outperform 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 7,000 Maximizer Enterprise customers and more than one million Maximizer users grow their businesses by building profitable customer relationships with award-winning solutions.

For more on Maximizer Enterprise 9, go to [www.maximizer.com](http://www.maximizer.com) for access to:

- More product details
- Online demonstrations
- Live webinars
- CRM best practices white papers
- 30-day trial software
- Pre-recorded webcasts
- System requirements

Maximizer Enterprise works with technology from the following partners



### Awards



Certified Solution Provider



**Maximizer™**  
The CRM Company [www.maximizer.com](http://www.maximizer.com)

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## Altimum IMS

Customer relationship management (CRM)  
Business Intelligence



*Specialists at Altimum IMS work closely with your key personnel to build customer loyalty and optimize your company's business processes and growth.*

### **Consultation**

Evaluation of your needs and identification of your goals. Analysis of your unique service offer and business processes.

- Sales
- Marketing
- Customer Service
- Business Intelligence

### **Integration**

Selection and customization of a CRM solution to meet your corporate goals.

### **Training/Coaching**

Customized training of your personnel to link technology and processes.

- CRM application functions
- Business processes
- Corporate culture

*Altimum IMS provides solutions which strengthen the relationship between your company and your customers.*

For further information about Altimum IMS services,  
Please call (514) 593-0085 or visit our Website:

[www.altimumims.com](http://www.altimumims.com)