Sage CRM

Driving
your business forward
in demanding times

with Sage CRM

sage

- How are my staff spending their time?
- Are all leads and opportunities being captured and followed up correctly?
- Are we targeting the most profitable customers?
- Are my customers satisfied with the level of service?
- How is each department performing?
- How can I empower my staff to become more productive?
- How can I ensure that budgets are being tracked and managed effectively?

These are just some of the questions senior managers and SMB owners face on a daily basis. Rest assured, there is a solution to those many challenges – Sage CRM.

Sage CRM offers a broad range of functionality with a low total cost of ownership to small and mid-sized organisations globally. Sage CRM equips sales, marketing and customer service teams with the tools they need to boost productivity, find new customers, close sales faster and build lasting, more profitable relationships across all channels. Regardless of how, when or where your customers, partners and prospects choose to interact with your business, Sage CRM provides a distinctive advantage by delivering a comprehensive, easy-to-use and intuitive system to successfully manage these relationships.

Additionally, Sage CRM connects your business like no other CRM application. Out-of-the-box it delivers tight integration with leading Sage ERP applications, breaking down departmental silos, connecting your front- and back-office and providing total visibility and control right across your business through the interactive dashboard.

Sage CRM's interactive dashboard revolutionises the way you manage your business. Information and feeds from within Sage CRM, external websites and integrated Sage ERP systems are all displayed in real-time on a single workspace so users have all the information they need at their fingertips. It eliminates the need to switch screens, driving productivity and ensuring the most efficient use of staff time.

Through its powerful workflow engine, Sage CRM drives organisation-wide, straight-through business process automation. Thanks to its ERP integration capabilities, Sage CRM delivers a 360 degree view of both customers and the business across the front- and back-office to enable deeper customer and business performance insight.

Due to its open architecture and web services interface, Sage CRM also enables easy integration with other business applications and on-demand services, making it more relevant to your business and delivering better business management.

BENEFITS OF SAGE CRM TO YOUR BUSINESS

Enables you to leverage further revenue opportunities within your current customer base

Ensures your sales, marketing and customer services resources are being used to maximum effect

Reduces your opportunity cost

Reduces your cost-of-sale

Reduces the cost of your marketing leads

Ensures you meet customer service level agreements

Minimises administration costs

Protects your net margin

Protects and grows your revenues

Enables you to pinpoint underlying issues and take corrective action accordingly

Reduces the potential for customer attrition

Ensures that your investments are all aligned to revenue development

Empowers your staff to provide exceptional service to your customers

Boosts productivity and enables staff to accomplish more in their working day

FEATURES AT-A-GLANCE

FOR ALL USERS

- Easy-to-use with fresh look and feel
- Fully customisable interactive dashboard
- End-user personalisation of interface design and content
- In-built user tutorials, user guide and quick tips
- Relationship management graphs

FOR MARKETING PROFESSIONALS

- Pre-installed marketing dashboard available out-of-the-box
- Ability to customise dashboard to create a bespoke workspace
- Campaign management and analysis
- Lead qualification and management
- Comprehensive email formatting options
- Mail merge functionality
- Document drop capabilities
- Outbound calling
- List management
- Customer segmentation capabilities

FOR SALES PROFESSIONALS

- Pre-installed sales dashboard available out-of-the-box
- Ability to customise dashboard to create a bespoke workspace
- Account, contact and opportunity management
- Comprehensive reporting and analytical tools
- Sales forecasting and territory alignment
- Calendar and activity management
- Process and workflow automation
- Mobile solutions and offline synchronisation
- Escalation and auto notifications
- Quote and order entry

FOR CUSTOMER SERVICE PROFESSIONALS

- Pre-installed customer service dashboard available out-of-the-box
- Ability to customise dashboard to create a bespoke workspace
- Customer self-service portal
- Case tracking and management
- Workflow automation
- Knowledge base recording customer service solutions
- Address maintenance and linking tools
- Escalation and auto notifications
- Reporting

FOR IT PROFESSIONALS

- Advanced customisation capabilities
- Out-of-the-box customisation
- Easy to install and fast to deploy
- Easy to integrate
- Flexible deployment options

INTEGRATION CAPABILITIES

- Microsoft Outlook Integration
- Integrates straight out-of-the-box with many leading Sage ERP products
- Computer telephony integration

The Interactive Dashboard

The Sage CRM interactive dashboard revolutionises the way you manage your business and how your employees manage their day. The interactive dashboard delivers a rich and personalised user experience that boosts productivity and helps drive user adoption across the business.

With the Sage CRM interactive dashboard, users can manage all their activity from one place. This includes their calendar, their tasks, their lists and web and RSS feeds, driving productivity throughout your organisation and enabling your staff to accomplish more from a tailored workspace that combines the information they use every day.

Users can define their own personalised and intuitive workspace from a series of gadgets and web feeds ensuring that all content is relevant to their needs, enhancing the user experience and maximising the productivity of your staff.

Using innovative drag and drop functionality, users can quickly and easily personalise the layout and information displayed on the interactive dashboard, delivering an intuitive and convenient way to view and action items and reducing the need to switch between screens. Users can manage their sales pipeline, check stock control from integrated Sage ERP systems, monitor industry news content, manage their calendar and appointments and control and process leads all from the same screen in real-time.

BENEFITS OF THE SAGE CRM INTERACTIVE DASHBOARD

- Enhances the user-experience through a range of personalised options
- Boosts staff productivity
- Empowers users to control and action activity from a single workspace
- Single view of relevant and comprehensive information enables businesses to make informed decisions
- Fully customisable layout using drag and drop technology for rich, user-driven experience
- Pre-installed role-based dashboards for Sales, Marketing, Customer Services and Management, delivering relevant content and immediate productivity gains for users and teams
- Out-of-the-box integration with LinkedIn® providing users with powerful networking opportunities direct to their dashboard
- Easy integration of web and social media sites, maximising relevant content and customer-connectedness across the organisation

• The Sage CRM Interactive Dashboard is an intuitive and customisable workspace from where users can manage all their daily tasks and activities for maximum productivity

Empower Sales Teams to Sell Effectively

Generating revenue from new and existing customers is an important task for companies. Sage CRM empowers organisations to sell more effectively and efficiently. Sales executives have a single point of access for calendars, accounts, reports, pipeline management, contacts and call lists; all of which ensure that they are producing more revenue per sales hour.

With Sage CRM, the sales team can manage and action all their activities from the interactive dashboard. This intuitive and interactive workspace enables the sales team to monitor their opportunities and pipeline, manage their calendar and tasks, and identify powerful networking opportunities from LinkedIn®, all from this customisable workspace.

Easy-to-use analytical tools help your sales team to identify latent sales opportunities which exist within your customer database, and then create cross-sell and up-sell propositions accordingly. Automated workflow and pipeline management

tools eliminate unnecessary paperwork and ensure that sales teams are optimising their sales processes and adhering to company-specific sales stages. This means that opportunities will be progressed as quickly and as efficiently as possible.

The interactive dashboard provides at-a-glance information to sales executives and managers on performance at any point in time. Integration with back-office applications provides sales staff with access to both financial and non-financial data, for a complete 360 degree view of their customers which is displayed on the dashboard for ease of reference.

Mobile and offline solutions provide sales teams with access to the information and services that they need to do their jobs effectively, regardless of their location, device or connection, thereby ensuring that they are as productive in the field as they are in the office.

> "Sage CRM supports a culture of constant progress. With Sage CRM, the next step is automatically built into the process, so we're always moving forwards together to make the most of sales opportunities and build closer customer relationships. It reinforces the rigorous discipline of how we need leads to be followed up and the business developed. It's not just on the most visible 'top ten' projects that Sage CRM adds value. It helps us to check that in chasing a new lead, salespeople are investing their time where it will bring best return."
>
> Mark Lightowler, Managing Director, Kaysersberg Plastics

BENEFITS OF SAGE CRM TO THE SALES TEAM:

- Improves transparency in the sales pipeline
- Offers exception monitoring/alerts
- Enables corrective action against variance earlier in the sales cycle
- Enhances sales forecast accuracy
- Enables quarterly sales performance monitoring
- Optimises sales resource against high potential opportunities
- Accelerates opportunity development
- Leads to improved win/loss ratio
- Leads to shortened sales cycles
- Increases prospect-to-customer conversion rate
- Delivers metrics on most valuable customers
- Reporting and analytics features to identify customer trends and profiles
- Enables more effective identification of new market opportunities
- Maximises cross- and up-sell opportunities
- Reduces sales training and administration costs
- Eliminates manual/duplicated sales processes
- Improves team collaboration on opportunities
- Decreases time spent on administrative tasks
- Improves prospect targeting
- Increases revenue yield per opportunity and account
- Leverages intelligence from back-office applications
- Boosts sales team productivity through the interactive dashboard
- Delivers a single view of relevant and comprehensive information to the sales team to maximise use of their time
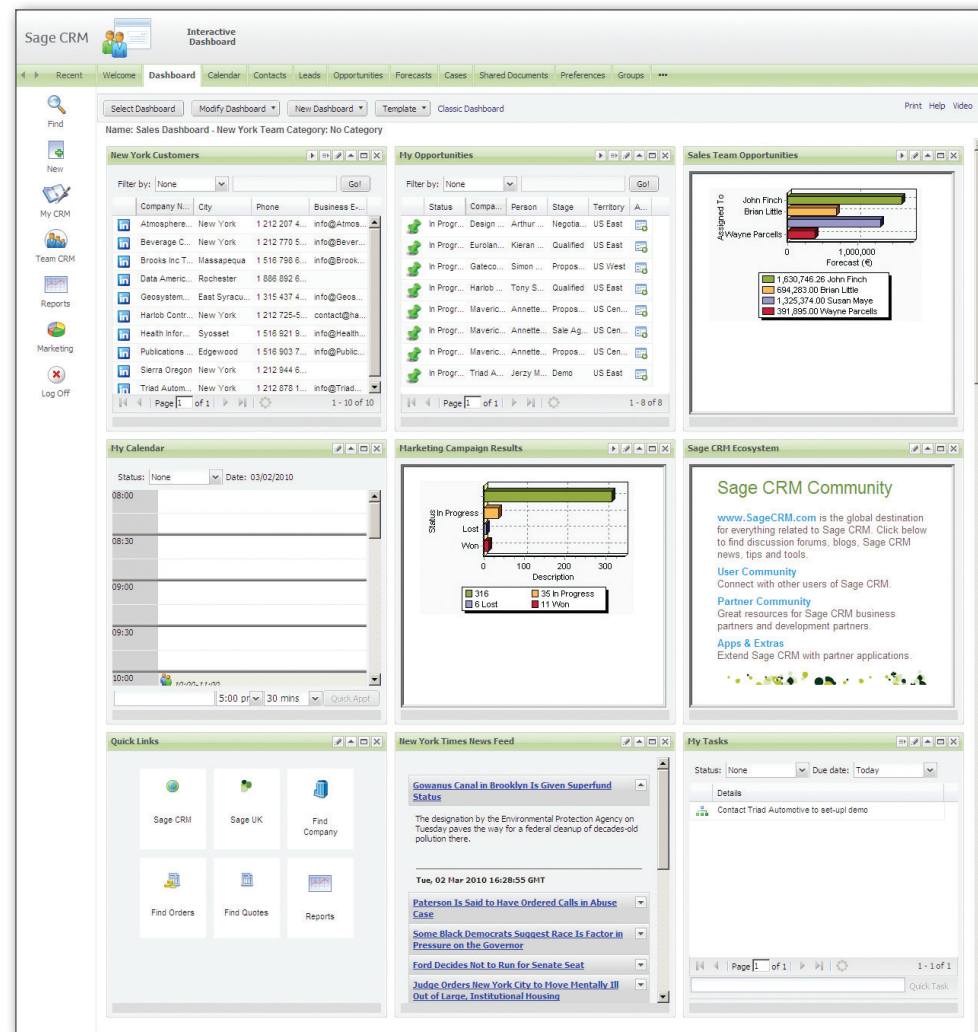
● The Sage CRM Dashboard makes it easy for users to customise layout and content, delivering a rich and personalised user experience

Deliver Highly Effective Marketing Programmes to Customers and Prospects

Sage CRM provides powerful tools for marketing teams to plan, execute and audit highly targeted marketing campaigns. Sage CRM allows you to develop a deep understanding of your customers' needs, enabling you to create a tailored proposition that can be communicated to them through their preferred marketing channels.

Sage CRM provides effective controls for monitoring marketing budgets and enables you to calculate direct revenue yields per campaign.

Sage CRM improves lead quality and ensures higher conversion rates by sales. The marketing team can leverage customer insights to develop retention programmes, as well as cross-sell and up-sell lifecycle management.

Marketing analytics and reporting ensure absolute accountability at all stages in the cycle, which means that ROI can be calculated with ease and the marketing budget is optimised at all times. This information can be displayed on the interactive dashboard for ease of reference.

The interactive dashboard is an intuitive workspace from which the marketing team can view and monitor marketing campaigns and activities. A pre-installed marketing dashboard is available out-of-the-box or users can customise their own dashboard or team dashboard with content that is relevant to them and their role.

With the interactive dashboard, the marketing team can link to reports to track the success of marketing campaigns and activities. The dashboard also display feeds from websites such as news monitoring which will keep them up-to-date with published news on their business and on their competitors. Users can also link to LinkedIn® and other social networking sites to identify networking opportunities with customers and prospects.

BENEFITS OF SAGE CRM TO THE MARKETING TEAM:

- Reduces marketing administrative overhead and enables marketing budget to be tracked and managed
- Enables marketing programmes to be planned more efficiently and effectively
- Improves marketing campaign response rate
- Produces highly targeted customer communications
- Leads to decreased cost per lead
- Leads to decreased cost per customer acquired
- Reduces marketing campaign lead times
- Delivers detailed information on the lifetime value of customers and enables profitable customers to be easily identified
- Enables real-time marketing performance analysis
- Optimises marketing spend
- Enables tracking of variance against targets
- Enables close alignment with the sales department and other key stakeholders
- Provides improved intelligence to marketing on lead generation activities
- Enables accurate measurement of marketing campaign ROI
- Ensures customers receive the right marketing message at the right time
- Ability to identify and provide customised products./services to different customer segments
- Delivers a single view of relevant and comprehensive marketing information on the interactive dashboard

Sage CRM   Marketing

Recent | Campaign Summary | Communications | Report | Shared Documents | ...

Campaign: TimeNExpense Marketing Campaign

Campaign Name:	**Start:**	**End:**	
TimeNExpense Marketing Campaign	01/01/1999	12/31/1999	
Status:	**Campaign Budget:**	**Actual Cost:**	
Active	$ 10,600.00	$ 10,600.00	
	€ 10,745.06 @ 1 : 1.013685	€ 10,745.06 @ 1 : 1.013685	

Find

New

My CRM

Team CRM

Reports

Marketing

Log Off

Change

Delete

Response Setup

Continue

Hide Wave Activities

Show Analysis [23]

Help

Cancel Activities (Campaign)

Waves

Wave 1 - Awareness

Wave 2 - TimeNExpense Conference Events

Wave 3 - Industry Advertising

Wave Activities

Mailer to target companies
Follow up Mailer
PR - Initial Press Release
Internal Telemarketing Follow Up
Outsourced Telemarketing Follow Up

Teaser Mailshot - Part 1
Email Shot
Teaser Mailshot - Part 2
Advertising
Web Site Show Registration
TimeNExpense Conference Stand
Show PR
Leaflets and Lollipops
Teaser Mailshot - Part 3

Ad in "Expenses Management Magazine"
Ad in "Finance Today"
Insert in "Business Travel" Magazine

● Campaigns can be easily managed and tracked using Sage CRM ensuring that the budget is maximised and that leads are actioned accordingly.

Ensure Customer Satisfaction and Loyalty

Keeping customers loyal and providing them with a satisfying and consistent customer experience can be hard to perfect. Sage CRM enables your company to roll-out web-based customer self-service quickly and cost effectively. From here, users can service their own information needs, track data and update the system without the requirement for customer service assistance and at the time and place of their choice.

Additionally, you can maximise the synchronisation between your service agents and your customers, ensuring that cases are progressed in a timely manner and in accordance with service level agreements (SLA) directly from the interactive dashboard without the need to switch between screens, maximising the productivity of agents. Knowledge management capabilities make it easier to capture remedies related to specific issues which may recur over time, making sure that agents are not duplicating effort.

Reports and graphical charts which are displayed on the interactive dashboard provide detailed analysis on metrics such as call volume, case resolution times, communications, follow-up statistics and escalation so management can quantify the performance of the agents to the business.

BENEFITS OF SAGE CRM TO THE CUSTOMER SERVICE FUNCTION:

- Enables customer satisfaction measurement and benchmarking
- Increases productivity of customer support representatives
- Ensures issues never "get lost between the cracks"
- Monitors service performance against service level agreements
- Enables customer issues to be tracked and responded to, regardless of who answers the phone or received the email
- Improves response times to customer service requests
- Reduces hold times for customers requiring customer support
- Reduces the average time to resolve an issue
- Increases the number of queries resolved on first contact rate
- Leads to decreased number of service escalations
- Decreases the number of customer complaints received
- Extends customer service through 24x7 self-service options
- Enables benchmarking/score carding of customer service operations on an on-going basis
- Leads to increased customer retention
- With the interactive dashboard, the customer service team can monitor customer cases from the one workspace, boosting agent productivity and maximising the efficient use of their time

- The Sage CRM case management function allows companies to ensure that customer issues/queries are being tracked, managed and followed-up effectively

Make Informed Business Decisions

Having a detailed knowledge of your business performance and a deep understanding of your customers is critical for senior management. Sage CRM provides extensive central control over operations and budgets, helping senior management to control these areas more effectively.

Reporting and graphical charts which are displayed for ease of reference on the interactive dashboard provide instant insight into business and employee performance across multiple criteria facilitating informed business decisions.

With Sage CRM, senior managers have the ability to validate forecast data with full drill-down to the underlying opportunities. Real-time visibility on revenue and budget variance ensures that decisions are based on accurate information, and corrective action can be taken earlier in the cycle when it has maximum impact.

Integrated with your Sage back-office applications, Sage CRM provides a complete view of the business and streamlined end-to-end business management capabilities.

"All of Abestway's achievements with Sage CRM have enabled the company to grow 40–50% in revenues, in the last 12–24 months, without dramatically increasing their workforce. We're able to hire less even though we're doing more business because of Sage CRM."

Mendy Gorodetsky, Asbestway

BENEFITS OF SAGE CRM FOR SENIOR MANAGERS:

- Drives revenue growth
- Improves profitability
- Provides improved support for strategic decision-making
- Enables real-time corporate performance management
- Drives productivity across the entire organisation
- Improves business/shareholder value
- Reduces margin erosion
- Reduces cost-of-sale
- Reduces customer attrition
- Reduces administration cost
- Eliminates process bottlenecks
- Reduces budget and performance variance
- Delivers at-a-glance business insight via the interactive dashboard

● The Sage CRM Interactive Dashboard enables management to manage business and team performance from a single workspace

Flexible, Affordable, Scalable Solution

With Sage CRM, you have the freedom to choose a solution that best fits your unique business requirements. You can choose from flexible deployment methods (on-premise or on-demand) with confidence, knowing that Sage CRM will grow with you as your business needs evolve, giving you the freedom to move from on-demand to on-premise through seamless migration options.

Sage offers an easy-to-use, fast-to-deploy on-premise CRM software solution with out-of-the box but configurable business process automation.

Users can get up and running quickly and easily thanks to the active directory import feature. Businesses can keep standard logons across their network which reduces administrative overhead and increases IT productivity.

Sage CRM offers flexible customisation options, automated process workflows, mobile solutions, offline synchronisation options across computer telephony integration (CTI), web self-service and more so you can improve productivity and empower your staff to communicate more effectively with your customers through Sage CRM.

SageCRM.com is a comprehensive on-demand CRM solution for businesses seeking a low-cost, turn-key option. The web-based CRM infrastructure and intuitive browser interface ensure you'll be up and running – and productive – quickly without burdening your IT staff.

A fixed monthly price delivers everything: the CRM application, support, training, backups and updates. Data is maintained at a secure, world-class, SAS70 certified data center. SageCRM.com is always on and always available to give your employees instant access to vital customer data from the internet, whether they are in the office, at home, or on the road.

BENEFITS OF SAGE CRM TO THE IT MANAGEMENT:

- Offers highly competitive total cost of ownership
- Requires minimum configuration out-of-the-box
- Lowers administration and deployment costs
- Modern web services, service oriented architecture
- Easy to integrate with third-party applications
- Easy to integrate with on-demand services
- Offers integration with leading Sage ERP systems
- Leverages previous investments in back-office solutions and internet technologies
- Avoids "rip and replace" in the future
- Scalable solution to accommodate growth and change
- Offers flexibility to adapt to unique business processes
- Supports mobile and disconnected staff
- Empowers end-users to be self-reliant around reporting requirements
- Delivers enhanced security and privacy of customer and corporate data
- Enables decreased administration associated with regulatory compliancy
- Enables IT to spend more time on strategic projects rather than day-to-day issue resolution
- Enables quick and easy batch import of users from a Windows® network with standard logons, increasing IT productivity and eliminating administrative overhead
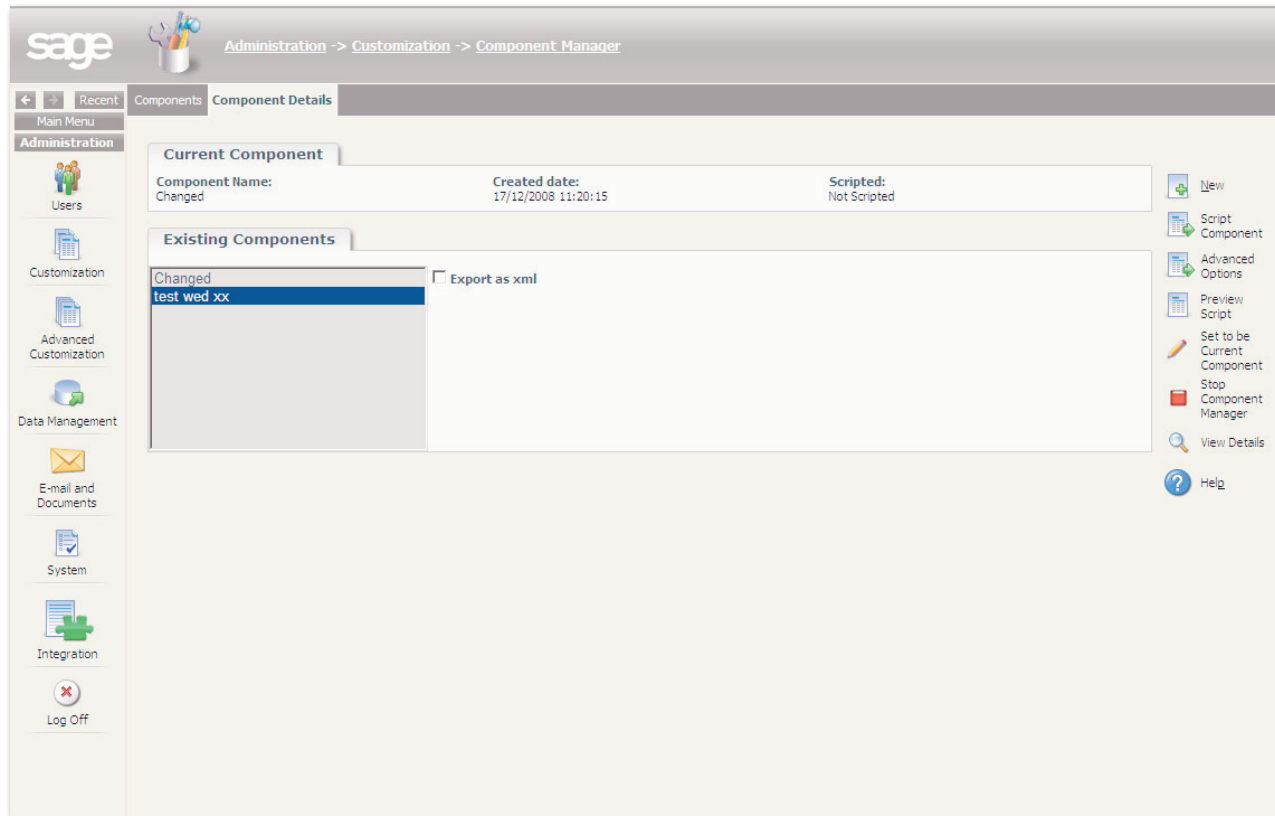
- Sage CRM makes it easy to continually customise the system using the Component Manager function. The system administrator can move a component customisation from the test environment to production environment with greater ease.

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About Sage CRM
Award-winning Sage CRM delivers full suite CRM (comprising sales, marketing and customer service automation) and offers a broad range of functionality with a low TCO to small and mid-sized organisations globally. Sage CRM equips sales, marketing and customer service teams with the tools they need to find new customers, close sales faster and build lasting, more profitable relationships across all channels. Regardless of how, when or where customers, partners and prospects choose to interact with your business, Sage CRM provides a decisive advantage by delivering a comprehensive, easy-to-use system to successfully manage these relationships.

Thanks to its Sage ERP integration capabilities, the Sage CRM front-office is powered by data from the back-office to give sales, marketing, customer service and other front-office staff a true 360 degree view of customers, differentiating it from many other CRM solutions in the market today.

The Sage Difference
- The leading supplier of SMB business applications in the world*
- Over 6.1 million customers
- Over 3.1 million Sage CRM Solutions users
- Over 13,400 employees
- Over 30,000 Sage-certified partners specialising in business applications
- Direct presence in 26 countries
- Relationships with over 40,000 accountancy practices
- 28 years experience

*Source: AMR Research, 2009, The Global Enterprise Application Market

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