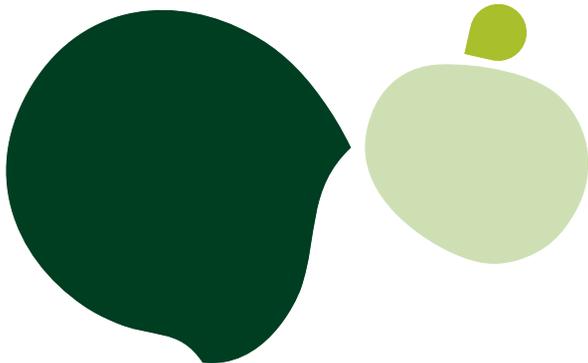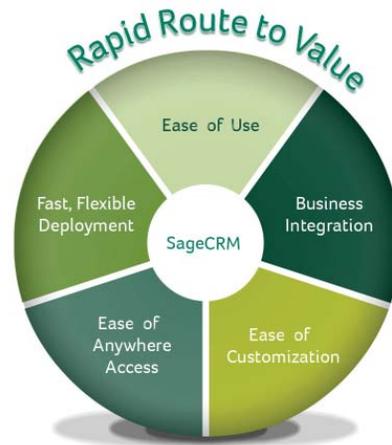# Communicate, Collaborate, Compete with SageCRM

sage

Customer Relationship Management (CRM) is more than just a software application. It is a business solution for all customercentric processes. It covers every interaction with customers across the entire business. It improves internal business processes, enables closer management of new and existing customer relationships, increases revenues, decreases inefficiencies, and provides management with timely and reliable insight to guide decisions.

With customers in over 70 countries worldwide, SageCRM is an award-winning, web-based customer relationship management solution. It is a full-suite CRM solution comprising sales, marketing, and customer service automation. Over 10,000 customers across the globe use SageCRM every day to manage and maximize the performance of their business and in particular their sales, marketing, and customer service activities.

- SageCRM offers customers a rapid route to value through its focus on ease of use, ease of deployment, ease of integration and ease of access anytime, anywhere.

Rapid Route to Value

SageCRM
- Ease of Use
- Business Integration
- Ease of Customization
- Ease of Anywhere Access
- Fast, Flexible Deployment

BENEFITS OF SAGECRM TO YOUR BUSINESS

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

Reduces your cost of sale

Reduces the cost of your marketing-leads

Ensures you meet customer service level agreements

Minimizes administration costs

Protects and grows your revenues

Ensures that your investments are all aligned to revenue development

Enables you to pinpoint underlying issues and take corrective action accordingly

Reduces the potential for customer attrition

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

Empowers your staff to provide exceptional service to your customers

Reduces your opportunity cost

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

Maximizes customer communications and interactions through integrated social media channels

FEATURES AT-A-GLANCE

For All Users

- Easy to use with fresh look and feel
- Fully customizable interactive dashboard
- End-user personalization of interface design and content
- Built-in user tutorials, user guide, and quick tips
- Relationship management graphs
- Impactful visual charts and highly graphical reports
- Real-time synchronization between SageCRM and Microsoft® Exchange® for seamless calendar management
- Dynamic linking of multiple information sources on a single dashboard screen
- Centralised meeting management
- Full calendar response management
- Fully customizable graphical workflow

For Marketing Professionals

- Preinstalled marketing dashboard available out of the box
- Multichannel campaign management
- Fully integrated e-marketing functionality
- Open, click, and bounce rate tracking for e-marketing campaigns
- Automated drip marketing campaigns
- Attention-grabbing templates out of the box
- Easy campaign cloning
- Lead qualification and management
- Mail-merge functionality
- Full marketing workflow
- Outbound calling
- List management
- Customer segmentation capabilities

For Sales Professionals

- Preinstalled sales dashboard available out of the box
- Ability to customize dashboard to create a bespoke workspace
- Account, contact, and opportunity management
- Ability to create key accounts dashboard
- Sales forecasting and territory alignment
- Calendar and activity management
- Process and workflow automation
- Provides iPhone and Blackberry users with critical access to real-time information
- Escalation and autonotifications
- Quote and order entry

For Customer Service Professionals

- Preinstalled customer service dashboard available out of the box
- Ability to customize dashboard to create a bespoke workspace
- Customer self-service portal
- Case tracking and management
- Workflow automation
- Knowledgebase recording customer service solutions
- Address maintenance and linking tools
- Escalation and autonotifications

For IT Professionals

- Out-of-the-box customization
- Easy to install and fast to deploy
- Easy to integrate
- Flexible deployment options
- Advanced customization capabilities
- Single point of entry for SageCRM and MS Exchange integration for ease of administration and rapid new user setup

Integration Capabilities

- Sage ERP integration
- Microsoft Exchange integration
- Microsoft Outlook integration
- Social media integration
- Web self service

The SageCRM Interactive Dashboard

The SageCRM interactive dashboard revolutionizes the way you manage your business and how your employees manage their day. The interactive dashboard delivers a rich and personalized user experience that boosts productivity and helps drive user adoption across the business.

With the SageCRM 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 organization and enabling your staff to accomplish more from a tailored workspace that combines the information they use every day.

Users can define their own personalized 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 maximizing the productivity of your staff.

Using innovative drag-and-drop functionality, users can resize and reposition gadgets, enabling them to personalize the data they see and how it is presented to them. This delivers an intuitive and convenient way to view and action items, 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.

The SageCRM Interactive Dashboard enables users to dynamically link multiple gadgets on a single screen, maximizing user productivity. A number of preinstalled role-based dashboards are available out of the box for sales, marketing, customer service, and management. Users can also create bespoke company dashboards for key accounts, ensuring that relevant content is available for maximum efficiency.

BENEFITS OF THE SAGECRM INTERACTIVE DASHBOARD

- Enhances the user experience through a range of personalized 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 customizable layout using drag-and-drop technology for rich, user-driven experience
- Preinstalled role-based dashboards for Sales, Marketing, Customer Service, 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, maximizing relevant content and customer-connectedness across the organization
- Provides multiple information sources on a single screen
- Enables users to resize and reorganise gadgets on the interactive dashboard for a fully personalized user experience
- Provides users with a company dashboard to enable users to manage key accounts better

● The SageCRM Interactive Dashboard is an intuitive and customizable 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. SageCRM empowers organizations 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 SageCRM, 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 customizable workspace.

Easy-to-use analytical tools help your sales team to identify latent sales opportunities that exist within your customer database, and then create cross-sell and up-sell propositions accordingly. Automated workflow and pipeline management eliminate unnecessary paperwork and ensure that sales teams are optimizing their sales processes and adhering to company-specific sales stages. This means that opportunities can 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 nonfinancial data, for a complete 360-degree view of their customers, which is displayed on the dashboard for ease of reference.

SageCRM provides the sales team with the ability to work from a mobile device regardless of where they are located. This ensures that they have fast, up-to-date access to critical customer data especially for those that are often out on the road. SageCRM supports online access to the system from iPhone, Blackberry, and Windows® mobile devices and has been optimized for the iPhone.

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 SAGECRM 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
- Optimizes 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
- Includes reporting and analytics features to identify customer trends and profiles
- Enables more effective identification of new market opportunities
- Maximizes cross- and up-sell opportunities
- Reduces sales training and administration costs
- Eliminates manual/duplicated sales processes
- Improves team collaboration on opportunities
- Provides seamless integration with Microsoft Exchange server, which enables field-based staff to access real-time calendar, task, and contact information on any smartphone
- 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 maximize use of their time

● SageCRM provides sales teams with the ability to work effectively regardless of their location by way of online access through the Apple iPhone.

Execute Highly Effective Marketing Campaigns Quickly and Easily

SageCRM provides powerful tools for marketing teams to plan, execute, and audit highly targeted marketing campaigns. SageCRM 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. Marketing campaign workflows can be easily customized so they are structured for consistent execution for maximum reach and impact. Users can clone campaigns easily, allowing them to create and share campaigns quickly and easily.

Sage E-marketing for SageCRM* is a fully integrated email marketing solution which includes attention-grabbing e-marketing templates, smart-sending features, automated drip-marketing campaigns and the ability to track open, click, and bounce rates, all from within SageCRM.

SageCRM Total Campaign Management allows marketing users to execute multichannel marketing campaigns and clone winning campaigns quickly and easily. With SageCRM, users can modify data while on a call to ensure clean data can be captured easily and leads can be rapidly converted to opportunities.

SageCRM provides effective controls and alerts for monitoring marketing budgets and enables you to calculate direct revenue yields per campaign. SageCRM improves lead quality and ensures higher conversion rates by sales. The marketing team can leverage customer insights to develop retention programs, 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 optimized 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 preinstalled marketing dashboard is available out of the box or users can customize their own dashboard with content that is relevant to them and their role.

Users can incorporate social media channels such as Twitter and LinkedIn into SageCRM enabling them to maximize their communications and interactions with customers and prospects.
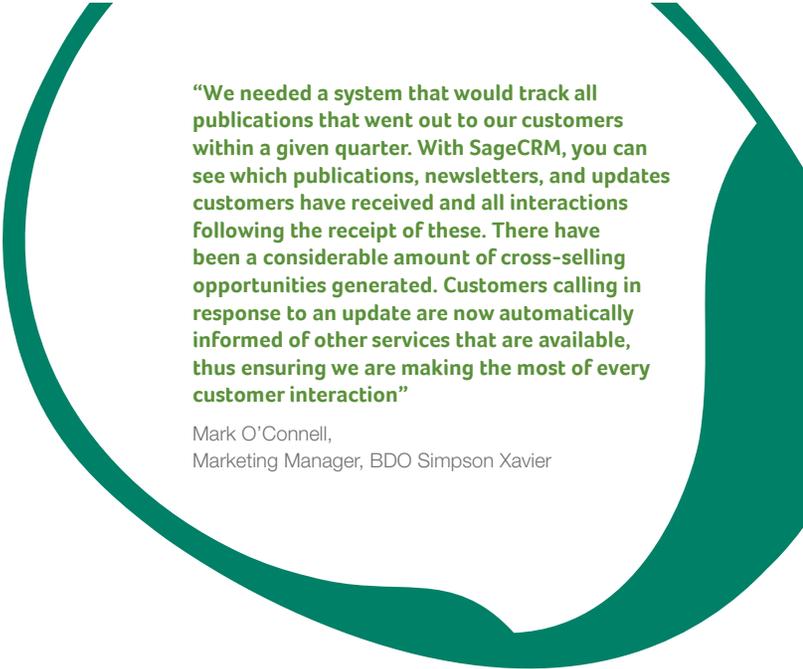
"We needed a system that would track all publications that went out to our customers within a given quarter. With SageCRM, you can see which publications, newsletters, and updates customers have received and all interactions following the receipt of these. There have been a considerable amount of cross-selling opportunities generated. Customers calling in response to an update are now automatically informed of other services that are available, thus ensuring we are making the most of every customer interaction"

Mark O'Connell,
Marketing Manager, BDO Simpson Xavier

BENEFITS OF SAGECRM TO THE MARKETING TEAM

- Reduces marketing administrative overhead and enables marketing budget to be tracked and managed
- Enables marketing programs to be planned more efficiently and effectively
- Improves marketing campaign response rate
- Produces highly targeted customer communications
- 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
- Optimizes 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
- Enables users to clone campaigns for departmentwide collaboration
- Enables users to set up budget alerts for pinpoint budget management
- Produces open, click, and bounce rate tracking for e-marketing campaigns
- Delivers a single view of relevant and comprehensive marketing information on the interactive dashboard

* Sage E-marketing for SageCRM requires an additional suibscription
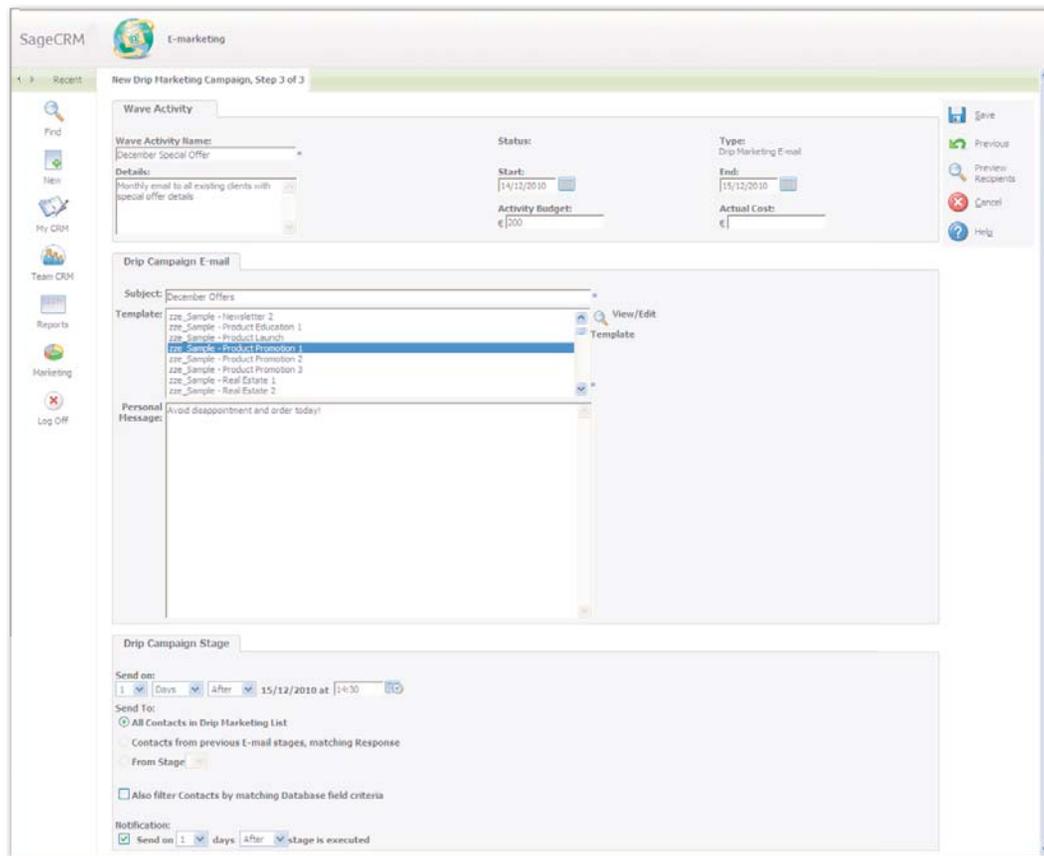
● Sage E-marketing for SageCRM enables users to roll out drip-marketing campaigns quickly and easily.

Ensure Customer Satisfaction and Loyalty

Keeping customers loyal and providing them with a satisfying and consistent customer experience can be hard to perfect. SageCRM 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 maximize the synchronization between your service agents and your customers, ensuring that cases are progressed in a timely manner and in accordance with service-level agreements

(SLA). All cases can be managed directly from the interactive dashboard, removing the need to switch between screens and maximizing the productivity of agents. Knowledge management capabilities make it easier to capture remedies related to specific issues that may recur over time, making sure that agents are not duplicating effort.

Highly visual reports and graphical charts which are displayed on the interactive dashboard and 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 SAGECRM 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 maximizing the efficient use of their time

● The SageCRM case management function allows companies to ensure that customer issues/queries are being tracked, managed, and followed up on effectively.
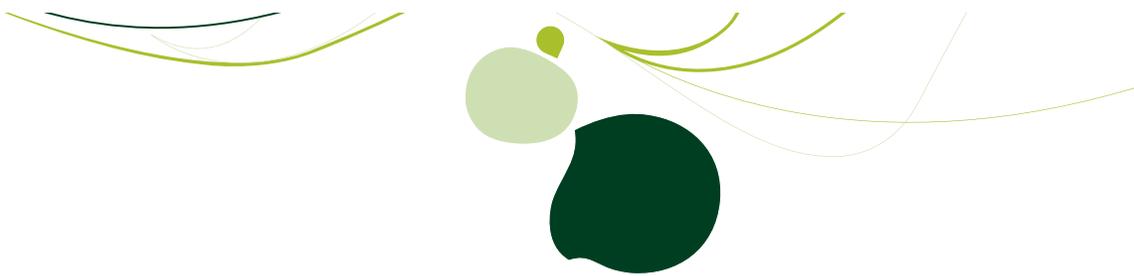
Make Informed Business Decisions

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

Highly visual reports and graphical charts, which are displayed for ease of reference on the interactive dashboard, provide at-a-glance insight into business and employee performance across multiple criteria, facilitating informed business decisions.

With SageCRM, 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, SageCRM provides a complete view of the business and streamlined end-to-end business management capabilities.

BENEFITS OF SAGECRM 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 organization
- 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 through the interactive dashboard
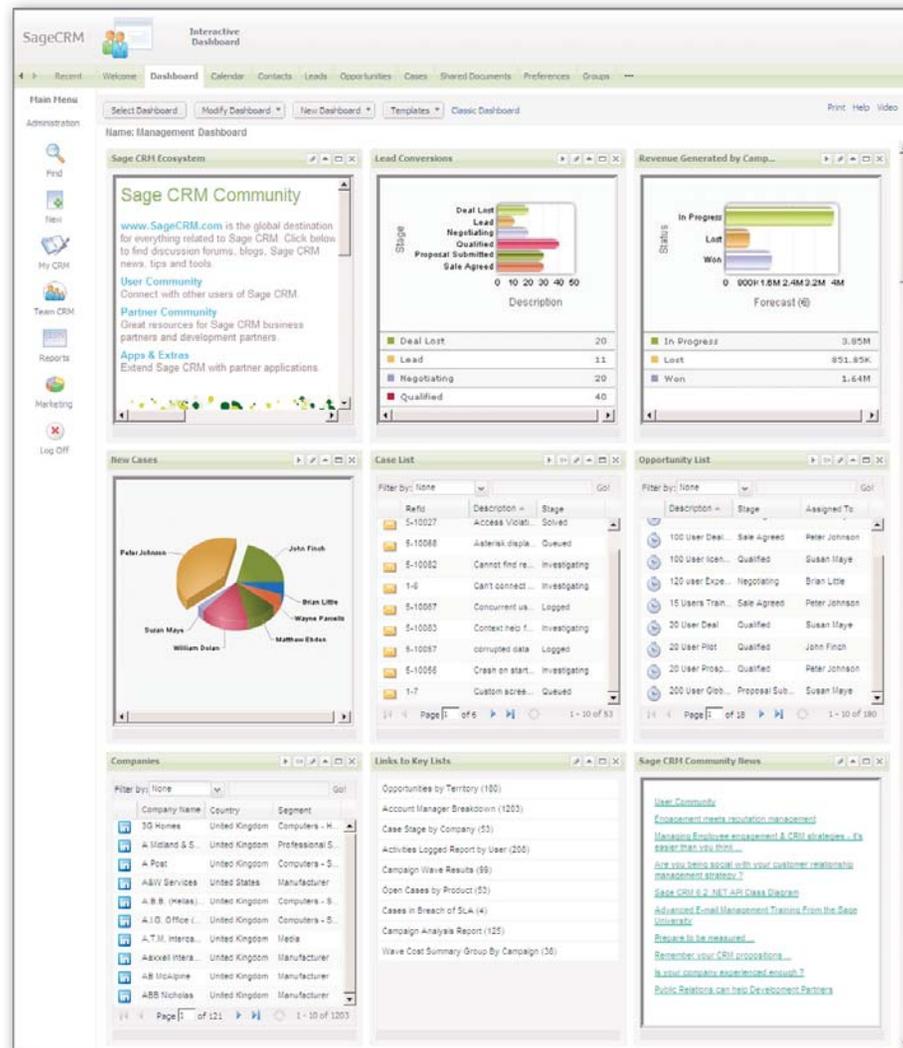
• The SageCRM Interactive Dashboard enables management to manage business and team performance from a single workspace.

Flexible, Affordable, Scalable Solution

With SageCRM, you have the freedom to choose a solution that best fits your unique business requirements. You can choose from flexible deployment methods (on-premise, on-demand, or cloud-deployable) with confidence, knowing that SageCRM will grow with you as your business needs evolve.

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

The web-based CRM infrastructure and intuitive browser interface ensure you'll be up and running—and productive—quickly without burdening your IT staff.

IT managers can get users 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.

SageCRM offers flexible customization options, automated process workflows, mobile solutions, web self-service, and more so you can improve productivity and empower your staff to communicate more effectively with your customers through SageCRM.

SageCRM.com is a comprehensive on-demand CRM solution for businesses seeking a low-cost, turn-key option.

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 is fully cloud-enabled for customers who want to run SageCRM in the cloud. This delivers the best of both worlds for customers who want all the customization capabilities of SageCRM with all the flexibility that the cloud has to offer.

Please contact your Sage Business Partner for full licensing and pricing details.

BENEFITS OF SAGECRM TO IT MANAGEMENT

- Offers highly competitive total cost of ownership
- Requires minimum configuration out of the box
- Lowers administration and deployment costs
- 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 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
- Administrators benefit from a single point of entry from where they can manage existing Exchange users and add new users for ease of administration

● Exchange Server integration can be created and synchronization under way rapidly.

About SageCRM

SageCRM is used by over 10,000 organizations in 70 countries worldwide to manage their critical sales, marketing, and customer service activities every day. Award-winning SageCRM equips businesses with the tools they need to find new customers, close sales more quickly, 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, SageCRM provides a decisive advantage by delivering a comprehensive, easy-to-use system to successfully manage these relationships. Thanks to its ERP integration capabilities, the SageCRM 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 across front- and back-office functions, differentiating it from many other CRM solutions in the market today.

Visit the SageCRM Ecosystem at www.SageCRM.com to join the conversation on our user and partner communities and to access the full range of SageCRM apps and extras.

The Sage Difference

- The leading supplier of CRM solutions to SMB organizations worldwide
- Over 6 million customers
- Over 3.1 million SageCRM Solutions users worldwide
- 13,600 employees
- Over 30,000 Sage-certified partners specializing in business applications
- Direct presence in 24 countries
- Relationships with over 40,000 accountancy practices
- 30 years of experience

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