

Sage CRM



Communicate, Collaborate,
Compete with Sage CRM

sage.co.uk/crm

sage

Customer Relationship Management (CRM) is far more than just a software application. It is a business solution that gives you the ability to connect with and understand real people covering every interaction with valuable customers across your entire business.

Sage CRM enhances your customers' experience by doing so many things they never even see enabling improved business processes, closer management of new and existing customer relationships, increased revenues and decreased inefficiencies. Sage CRM provides management with timely and reliable insight to guide important business decisions.

As the leading supplier of business management solutions to small and medium-sized businesses, Sage has over 6 million customers worldwide. More than 12,000 organisations in 70 countries use our award-winning Sage CRM software to manage their critical sales, marketing and customer service activities every day.

With a choice of editions, and deployment options, Sage CRM has a solution that can meet the individual needs of your business and accelerate your business growth.



BENEFITS OF SAGE CRM TO YOUR BUSINESS

Ensures your sales, marketing and customer service 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

Minimises 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

Maximises customer communications and interactions through integrated social media channels

- Sage CRM 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.

Sage CRM, delivering an enhanced user experience every time

Sage CRM is optimised specifically for small and medium-sized businesses. Easy to use and quick to deploy in the cloud or on-premise, it delivers a rapid return on investment so you see a positive impact on your business straight away.

Plus, it can be easily adapted by you to make it fit how you work, saving you time and money, both now and in the future. In this way, we can help you get the most from your CRM investment and accelerate your business growth.

Features At-A-Glance

FOR ALL USERS

- Easy to use interface with a fresh look and feel
- Fully customisable interactive dashboard
- End-user personalisation of interface design and content
- In-built user tutorials, user guide, quick tips and product videos
- Relationship management graphs
- Impactful visual charts and highly graphical reports
- Real-time synchronisation between Sage CRM and MS Exchange for seamless calendar management
- Dynamic linking of multiple information sources on a single dashboard screen
- Centralised meeting management
- Full calendar response management
- Fully customisable graphical workflow
- Access Sage CRM across all modern internet browsers with cross-browser compatibility

FOR IT PROFESSIONALS

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

INTEGRATION CAPABILITIES

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



“The ease-of-use and flexibility of the system has allowed us to rapidly implement and evolve our sales model helping to contribute to a 240% YOY revenue growth.”

Toby Pannell,
Managing Director,
Katalina Media



Watch our quick, two minute video and see for yourself how easy it is to use Sage CRM in your business

bit.ly/SageCRMBenefits



Manage your critical Sales, Marketing and Customer Service activities everyday with Sage CRM



Empower Sales Teams to Sell Effectively

Sage CRM directs your sales efforts towards the most profitable, most winnable deals, and helps you make the most of cross-selling and up-selling opportunities. With instant access to pipelines, calendars, sales reports, contacts, and much more, your sales people are freed up to focus all their efforts on selling.

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 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 efficiently as possible.

BENEFITS OF SAGE CRM TO THE SALES TEAM

Maximise the value of every sales opportunity in your pipeline

Create accurate Quotes and Orders in a couple of clicks

Manage collaboration and team selling across your department with ease

Eliminate guesswork; make decisions based on accurate, real-time information

Empower your team and boost productivity with a single view of leads, opportunities, tasks and activities

Enables quarterly sales performance monitoring, improving consistency across the sales organisation

Maximises cross- and up-sell opportunities

Great user experience on any browser with cross-browser compatibility

Leverages financial information from the back-office system

Reduces time spent in the office on sales administration (more time on sales calls)

Enable sales teams to work effectively regardless of their location with Sage CRM mobile solutions



“In the sales department, Sage CRM is the tool that we use all day long. It is vital in fact, because we log all our customer contact in Sage CRM and all our opportunities are tracked in Sage CRM. We would actually lose sight of our opportunities if we didn’t have a system like Sage CRM.”

Aine O’Mahony,
Business Development Team Leader,
CarTrawler

Sage CRM 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. Sage CRM supports online access to the system from iPhone, Android™ and Tablet devices.

Execute Highly Effective Marketing Campaigns Quickly and Easily

An invaluable tool for marketers, Sage CRM helps you to plan, execute, and measure the success of every marketing campaign. It becomes much easier to get the right messages to the right people at the right time, eliminating guesswork, and making the best use of your marketing resources. Marketing campaign workflows can be easily customised so they are structured for consistent execution and for maximum reach and impact. Users can clone campaigns allowing them to create and share campaigns quickly and easily.

Sage E-marketing for Sage CRM* 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 from within Sage CRM.

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.

BENEFITS OF SAGE CRM TO THE MARKETING TEAM

Create, track and manage dynamic marketing campaigns that really deliver

Plan and track activities, tasks, budgets and details for each marketing activity

Produces highly targeted customer communications improving response rates

Enables real-time marketing performance analysis and pinpoint budget management

Fully customisable marketing workflow out-of-the-box for rapid campaign execution

Includes Sage E-marketing for Sage CRM* with pre-designed email templates that cover all communication needs

Tracks all e-marketing email interactions including open, click and bounce rates automatically through Sage CRM

Maximises customer communications and interactions through integrated social media channels

Great user experience on any browser with cross-browser compatibility



“Sage CRM adds a new level of professionalism to our direct mail, telemarketing and email campaigns. The detailed reports we generate give us immediate results, so we can tweak a campaign for greater effectiveness. Our campaigns are at least 20 percent more successful due to Sage CRM.”

Tom Matheny,
Database Marketing Manager,
Buffalo Sabres

* Sage E-marketing for Sage CRM requires an additional subscription

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.



“Whenever we answer a call to a client, we have their information at our fingertips, so the client feels a lot more valued.”

**Mike Bowers, Managing Director,
Cellular Solutions**

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). All cases can be managed directly from the interactive dashboard removing 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.

BENEFITS OF SAGE CRM TO THE CUSTOMER SERVICE TEAM

Manage your customer accounts with insight and collaboration

Respond to customer cases quickly, reducing response times to customer service requests

Enable agents to quickly and accurately find the right answer the first time

Enables customer satisfaction measurement and benchmarking

Increases productivity of customer support representatives

Provides self-service facility to customers around common issues

Enables customer issues to be tracked and responded to, regardless of who answers the phone or receives the e-mail



Sage CRM delivers a rich and personalised user experience, increasing productivity throughout your business



Sage CRM 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.

Using innovative drag and drop functionality, users can re-size and re-position gadgets, enabling them to personalise 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. A number of pre-installed 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.

Cross-browser Compatibility



- ◆ Access your personalised interactive dashboard from the browser of your choice with cross-browser compatibility.

Sage CRM provides end users with the ability to access their solution across all modern internet browsers and work efficiently through the modern, intuitive interface. The end-user supported browsers in Sage CRM v7.1 SP2 include Internet Explorer (versions 7, 8 and 9) and the latest versions of Firefox, Chrome and Safari.

Sage CRM Mobile Solutions

Sage CRM's mobile solution covers Apple iPhone, Android™ (Beta) and Tablet (Beta) devices effectively allowing your mobile workforce to access critical customer information when on the road. Sage CRM mobile solutions help maximise user productivity by enabling users to access critical real-time customer data while on the move and increases sales and service effectiveness at every stage of the customer relationship cycle.

Sage CRM mobile solutions are an important asset to your sales



- ◆ Sage CRM equips your mobile workforce with access to critical

team enabling users to quickly search and update contacts, opportunities, leads and cases and to run and view reports on the move.



“The Sage CRM for iPhone add-on is great. It’s clean and crisp and very readable - I love the use of the spinners for the select lists! It gives my users the ability to get basic information while out in the field and for a service company that’s huge.”

Karen Snyder, CIO, American Pool



- ◆ Watch our quick video and see how Sage CRM for iPhone can benefit your business.

Sage CRM Social Media Solutions

Combined with CRM, social media channels can make an immediate positive and accelerated impact on sales, marketing and customer service activities. The emergence of social media channels such as Twitter and LinkedIn® have changed the way that companies interact and engage with people (prospects/customers/media/industry); how they control what is said about them and how they are perceived by those groups.

Sage CRM integrates with key social media applications to enable users to engage with prospects and customers in a collaborative manner in order to generate leads, foster loyalty, build customer retention and increase revenue.

Out-of-the-box integration with LinkedIn® enables users to tap into the endless possibilities of social networking for instant knowledge about customers and prospects. Sage CRM for Twitter enables companies to manage their communications with prospects and customers directly from within Sage CRM. Thanks to the website gadget on the Sage CRM interactive dashboard, users can browse social media sites from within Sage CRM, removing the need for users to switch between applications.

Sage E-Marketing for Sage CRM*

Sage E-marketing for Sage CRM* 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 Sage CRM.



- ◆ Users can benefit from a simple 3-step wizard to easily create new e-marketing campaigns with a choice of over 90 templates to get started immediately.

* Sage E-marketing for Sage CRM requires an additional subscription

Sage E-marketing for Sage CRM delivers all the power of e-marketing software directly through Sage CRM for end-to-end marketing campaign management. With a library of over 90 highly designed templates, users can execute targeted email marketing campaigns and drip marketing campaigns to the right people at the right time for maximum impact.

Open, click and bounce rates are automatically tracked enabling users to calculate accurate RoI and deliver hot leads to the sales team. Please refer to the Sage E-marketing for Sage CRM Datasheet for more information.

Make Informed Business Decisions with Sage CRM

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.

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 Sage CRM, senior managers have the ability to validate forecast data with full drill-down to the underlying opportunities.



“Sage CRM is going to allow me to continue to grow the efficiencies within the company without increasing the overhead which is very important.”

**Penelope Pearce,
Controller, EcoWater**

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.

Sage CRM ERP Integration

Staying connected, linked in and accessible are fundamental requirements for every fast-paced SME – which is why Sage CRM has a range of inclusive solutions for better business



“We believe that we’re now one of the leaders in the industry in providing critical information to clients, instantly accessible whenever they want it. This helps us to win new business and enhance our service to existing clients.”

**Simon Adcock,
Managing Director,
ATEC Security Limited**

integration.

Integration with a range of Sage ERP solutions allows businesses to connect their front- and back-office operations. These integration capabilities are a great benefit to sales, marketing and customer service teams providing them with access to customer data from the back-office allowing a true single view of the customer.

ERP Integration ensures your sales teams are equipped with the most accurate and up-to-date information regardless of where that information is located. Operations are optimised as a result and there is less potential for delay, misunderstanding and error.

In a similar way, marketing staff can leverage account information, enabling them to identify buying trends or suitable target segments. Access to financial information on customers, provides the marketing team with the ability to create marketing lists based on financial profiles and target customers with good credit ratings and purchase histories.

Customer Service agents can access crucial data to give accurate information to customers without delays, thereby improving customer service and driving customer loyalty. Information from the Sage ERP system can be displayed directly on the interactive dashboard for quick and easy access.

Flexible Deployment Options: On-Premise or in the Cloud

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 in the cloud, with confidence, knowing that Sage CRM will grow with you as your business needs evolve.



- Our flexible, low-cost solution is available on-premise or in the cloud.

Our cloud-based solution provides business with immediate access to a powerful CRM solution at a low monthly cost. The web-based Sage CRM infrastructure and intuitive browser interface ensure you'll be up and running – and productive – quickly, without burdening your IT staff.

Our Sage CRM on-premise solution offers users deeper customisation capabilities and powerful integration options with other Sage products. Automated process workflows, mobile solutions, web self-service and more help improve productivity and empower your

About Sage CRM

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For more information visit www.sage.co.uk/crm or call 0845 111 99 88.

The Sage Difference

- The leading supplier of CRM solutions to SMB organisations worldwide
- Over 6.3 million customers
- Over 3.1 million Sage CRM Solution users worldwide
- Over 13,400 employees
- Over 30,000 Sage-certified partners specialising in business applications
- Direct presence in 24 countries
- Relationships with over 40,000 accountancy practices
- 30 years experience