

POWER TO RUN YOUR BUSINESS

sage

CRM



"This means our company is now fully empowered to effectively identify and track new opportunities, cut overheads, boost sales, and increase customer satisfaction. And all thanks to Sage CRM."

**Tim Oliver, Group Marketing Manager for Tensar International, Blackburn**



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# CRM

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# What is Customer Relationship Management?

**Imagine being able to know a customer in great detail at any given time. You know how much business they did with you last month. You know that it was 15% more than in the same month last year. You know that this customer cares more about quality than price. You know they've had one customer service call in the last 12 months. You know the details of that conversation and every other interaction. You know this customer's business. You know their challenges. You know them with the familiarity of a long-term acquaintance. This is the power of Customer Relationship Management (CRM) from Sage.**

CRM improves employee efficiency. It helps you to gain a complete view of your customer at any time and has advanced reporting functionality which provides a crucial basis for sales planning, marketing investment and tracking. It is about understanding the buying habits and preferences of your customers and prospects so you can:

- Build and strengthen customer relationships to keep them coming back
- Provide value-added services that are difficult for competitors to duplicate
- Improve your product development and service delivery processes
- Increase your staff's awareness of customer needs

- Reduce customer frustration by not asking the same questions over and over

By effectively integrating your marketing, sales and customer service functions, a good CRM system makes it easier for everyone inside your company to work together and share critical information.

An effective CRM system empowers your customers and prospects to do business with you – the way they choose! Imagine connecting your customers to your employees and business partners across any department, through any process and via any communication device – phone, fax, email and internet.



# Sage CRM

**Sage CRM is an Internet-based CRM solution designed to bring the real benefits of CRM to your organisation. It's designed to be easy to use and deploy, affordable and packed with useful features.**

**Sage CRM uses industry-leading technology to foster better business practices and effortless information exchange throughout your organisation. With Sage CRM, you can quickly analyse, manage, and synchronise sales, marketing and customer care activities across all points of contact.**

**Regardless of how, when or where your customers, partners, and prospects choose to interact with your company, Sage CRM gives you a decisive advantage by providing comprehensive, easy-to-use tools to successfully manage these relationships.**

## Versatile CRM

Sage CRM offers unmatched flexibility and performance with advanced features, industry-leading technology, and a robust architecture built to stand the test of time. It integrates seamlessly with industry-leading Sage accounting and business management applications as well as linking with the leading applications from the world's other leading vendors.

## Sage CRM includes:

**Sales Force Automation** – Sage CRM puts you in complete control of your sales pipeline, allowing sales teams to effectively manage, forecast, and report on all phases of the sales cycle. With Sage CRM, you can easily manage and analyse all current and historical account details and activities, manage multiple accounts and opportunities, and automatically distribute leads to sales professionals around the world. Point-and-click reporting and graphs offer sales teams access to real-time data, for on-the-spot analysis and evaluation. By analysing the information available, you can acquire new clients and resell to existing ones.

**Marketing Automation** – Sage CRM provides a single source of customer information to help you better manage your marketing efforts and make sound decisions based on the needs of your customers and prospects. With Sage CRM Marketing, you can target the right customer at the right time, eliminate guesswork, and put your marketing resources to their best use. You can schedule and track marketing activities within a campaign—and view every detail of each campaign.

**Customer Service Automation** – With Sage CRM, you can make the most of every customer interaction, maximising business opportunities and customer satisfaction. It empowers your organisation with critical information to build and support long-term customer satisfaction and loyalty.

With Sage CRM Customer Service, you can build and effectively manage lasting customer relationships by providing the professional level of service your customers expect. Sage CRM provides real-time access to relevant customer data including orders, call and escalation history, interactions, multiple contacts, support cases, e-mail and documents sent and received, sales opportunities, and more.

“When we looked at Sage CRM it provided us with all the basic functionality we needed but also a lot of other features we were not even aware existed and all at an extremely good price that equivalent CRM packages were not even close to matching.”

**Mark O'Connell**, Marketing Manager, BDO Simpson Xavier, Limerick.

### Training and Coaching

Sage CRM offers exceptional support for your users. We have provided a welcome tab from which users can access online training videos, system quick tips, system documentation and more. Sage CRM also offers unique on-screen coaching, allowing customised text to be displayed as users go from screen to screen. This built-in training means that Sage CRM is even more user-friendly and helps new users to get up to speed quickly. What's more, the embedded support functions increases user confidence, resulting in greater acceptance of the system and more efficient users.

### Web and Wireless Access

As a web-based application all you need is an Internet connection and your password to access your full CRM system wherever you are in the world. Or if a connection is not possible users can use Sage CRM's robust replication and synchronisation solution for full offline access. The system can also be accessed through a variety of wireless devices.

### Web Self Service

Sage CRM Web Self Service allows customers to access information or request services and support over the Web whenever they want. Customers receive information based on their preferences, requests, and history through customised customer and partner portals.

### Outlook Integration

Sage CRM has complete, two-way synchronisation with Microsoft Outlook contacts, calendar (appointments) and tasks, in addition to enhanced e-mail integration. You also have the option to use your entire Sage CRM system from within the standard Microsoft Outlook interface. Lastly, this comprehensive integration also enables you to synchronise your CRM data to pocket devices such as mobile phones and PDAs that synchronise with Outlook.

### Automated Process Workflow

With Sage CRM Workflow businesses can automate pre-determined business rules across all channels, departments, and employees. To help assess and design workflow, Sage CRM provides graphical views of the process and its development patterns. The fully embedded workflow allows you to truly model how you would like your business to run and put in rules to ensure it happens. SLAs and processes can be made to work and your staff and customers can work to known, repeatable and automated processes that makes your company do the right thing every time.

### Customisations

Sage CRM has easy-to-use customisation tools allowing you to quickly modify all aspects of the system. With its open architecture, Sage CRM minimises your development and maintenance costs and makes integration into other mission-critical applications straightforward. Your system administrators and managers can use simple on-screen tools to create and modify fields, whole new screens, tabs, tables, views and scripts on the fly. You can apply field-level security using checkboxes at the Field Level, without needing any programming skills at all. This customisation functionality means that Sage CRM can be easily adapted to your business.

“Where Sage CRM stood out was that, as a web-delivered product, it had an interface with which our users would be familiar and would only require a single implementation. This architecture also had positive implications for scalability, which suited our company during the rapid growth phase.”

**Adam Pope**, Manager IT Sales and Marketing, Insight Investment, London

## How can CRM improve your business?

**Sage CRM gives your customer service teams user-friendly tools allowing them to access relevant customer data, including purchases, call and escalation histories, interactions, emails and documents sent and received.**

### Improve Sales Efficiency

Sage CRM provides tools that help sales professionals find and retrieve vital information quickly and easily. Sage CRM provides a snap shot of the sales cycle from first contact to final sale, allowing sales teams to effectively analyse and manage the sales pipeline. Quotes and orders can be easily created and saved so they can be pulled again in the future, saving time to sell not on administration.

### Manage and Track Campaigns

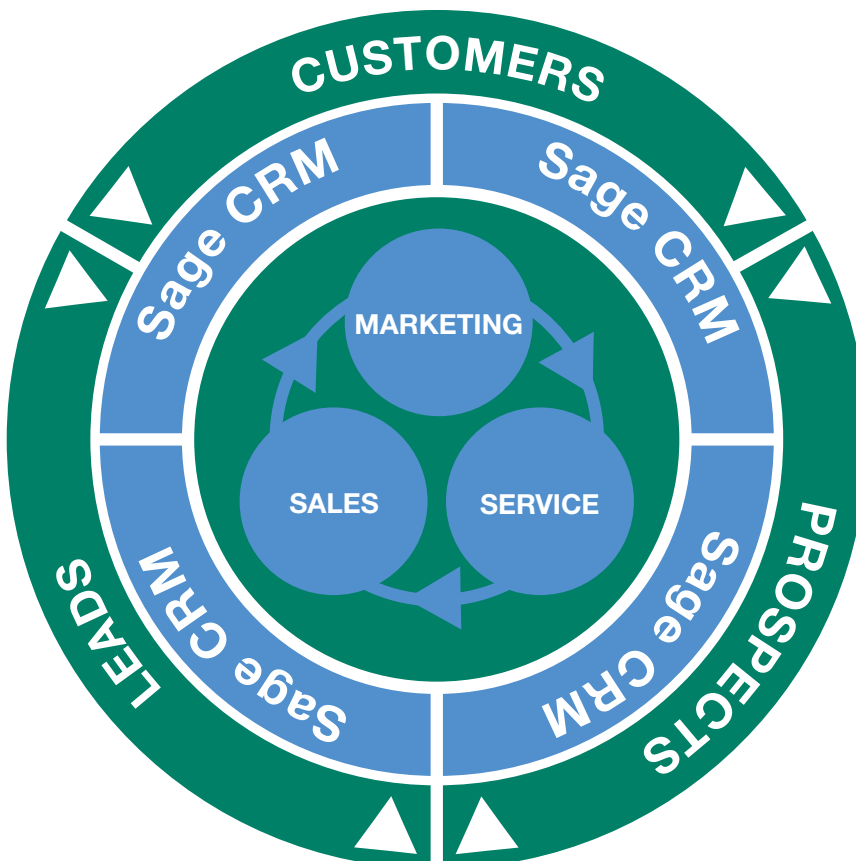
Sage CRM makes it easy to view activities and objectives and view leads generated and their follow up. You can drill down to specific activities within a campaign including communications,

opportunities, responses, budget, actual cost and list of prospects. This in-depth view of your campaigns allows you to eliminate the guesswork and put your marketing resources to their best use.

### Improve Customer Relations

Resolve customer issues efficiently by providing customer service professionals with user-friendly tools to access relevant customer data including purchases, call and escalation histories, interactions, emails and documents sent and received. Armed with this customer knowledge they can handle customer queries more efficiently, which in turn enhances and strengthens the customer experience whilst improving job satisfaction.

### An Integrated CRM System



“We wanted to improve our view of the customer at any given time throughout the sales cycle. We also needed a more automated way to track and assign customer leads, a better way of capturing all our customer contacts, and a way of delivering more timely and accurate reports.”

**Cormac Ó Foghlú**, Worldwide Infrastructure Manager, IONA, Dublin

# How Sage CRM Benefits Sales Users

## The Every Day Tools for Effective Selling

Sage CRM provides organisations with the tools they need to sell more effectively. It is an easy-to-use application that provides thousands of sales users every day with instant access to diaries, accounts, reports, pipelines, contacts, and call lists - in short everything sales people need to get their job done. For an organisation, all this information is rolled up, tracked and reported on, giving continuous, meaningful and accurate reports on just how a sales team is performing.

## Maximise Sales Effectiveness

Sage CRM helps organisations to grow revenue more quickly, providing sales professionals with the tools to focus on the right deal at the right time. In addition, Sage CRM provides a snapshot of the sales cycle from first contact to final sale, allowing sales teams to effectively analyse and manage the sales pipeline. Sage CRM gives you access to the purchase history of every account so you can see who bought what and when. This allows for greater certainty that the value of each deal is being maximised. This also helps build relationships as discounts can be checked and given without delay for regular customers.

## Manage Sales Groups More Effectively

For sales management, Sage CRM delivers the reports every hour, every day, which let you know you know how the team is performing, who is winning business and who needs help. It eliminates the shocks and surprises that can destroy a good quarter. It allows you to organise teams and schedule calls with simple point-and-click technology that co-ordinates and fills diaries. It brings control to your fingertips allowing you to sell lean and focus on the priorities.

## Sage CRM Sales Feature List

### Sales Forecasting & Reporting

- Accurate, timely forecasts allow your sales people and managers to make their own assessments of all leads, ensuring leads are never dropped or lost
- Point and click reporting and graphs allow your sales teams to access data for on-the-spot analysis and decision-making

### Management of Vital Opportunities & Leads

- Sage CRM helps you track leads from first contact to final sales, ensuring time and energy is spent on the deals that are most likely to close
- With Sage CRM, you can manage and analyse all current and historical account details, making it easy for your sales team to identify and recruit new customers and resell to existing ones.

### Build & Maintain Profitable Customer Relationships

- Deliver superior customer service by having the most up-to-date and complete customer information at your fingertips
- The critical customer information captured in Sage CRM helps you create more up-sell and cross-sell opportunities.

### Account & Activity Management

- Escalation and reassignment of leads ensure that the employee most qualified to handle the situation addresses your client's needs
- Configure alerts to trigger literature fulfilment, follow-up appointments, callbacks, daily tasks and much more
- Security level assignment makes sure only the right people see information relevant to them

### Territory Management

- There are assignment rules to automatically route leads to the right sales rep based on territories. It's easy to create, merge and move territories and the data associated with them.
- Gain insight into sales effectiveness and performance by territory
- View marketing campaigns, response rates and associate sales revenue by territory

### Enhanced Outlook Integration

- Continue to run your e-mail, diaries and contacts through Outlook with auto-synch recording all interactions in CRM
- All contacts, tasks and appointments can be shared between diaries in both systems to allow sharing of information
- View CRM entirely through Outlook, allowing users to see the benefits of CRM but using a familiar interface

### Graphical Reporting

- Graphical forecasting and reporting features allow you to filter data any way you choose
- Use system default reports or easily create new reports with a reporting wizard that walks you through the process

### Escalation & Notification Alerts

- Ensure business opportunities are never missed, by sending real time alerts to the right individuals based on their roles
- Deliver periodic messages to sales managers summarising critical opportunity and forecast information for their direct reports

### Quotes & Order Entry

- Generate sales proposals automatically reflecting local customer currency, customs and taxes
- Access current product information, integrate with our accounting or your existing legacy systems and deliver the most up-to-date quotes

### 'Stay on Top' Time Management

- Onscreen reminders, notification alerts, automation of literature fulfilment and the simplification of other non-revenue generating activities all impact on business and personal performance
- Ability to monitor data proactively and notify management automatically of key business indicators

### Campaign Management

- Allow sales teams to easily set up, run and maintain their own marketing campaigns such as letter or e-mail campaigns
- View responses to each campaign, replicate effective initiatives and assign return on investment to each campaign
- Integrates completely with the marketing functions to allow instant feedback and information from the campaign to sales person

### Access Anywhere Anytime

- Work offline or work online over a network or the Web, seamlessly synchronise between the two

# How Sage CRM Benefits Marketing Users

## Benefits for Marketing

Sage CRM provides powerful tools for managing, tracking and analysing targeted marketing campaigns. It is an easy-to-use application that provides hundreds of marketing users every day with the tools to target the right customer at the right time, eliminate guesswork and put your marketing resources to their best use. Assign, schedule and track marketing activities and view every detail of each campaign at a glance.

## Build a Detailed Profile of your Audience

Sage CRM enables you to build up a detailed profile of your customers and prospects over the course of the relationship. Lists can be assembled based on multiple criteria from your database, responses to campaigns can trigger sub-lists for the next stage of the campaign with successful responses moved to sales and non-responses kept on a reminder list or removed if so

requested. This information can be stored, reported, and segmented for future campaigns.

## The Every Day Tools for Marketing Evaluation

With Sage CRM you can view your campaign status at any time and evaluate return on investment (ROI). Using sophisticated, user-friendly tools and reports, you can analyse marketing campaigns by lead sources or evaluate other important campaign details. Source or evaluate other important campaign details by using sophisticated, user-friendly tools and reports. Sage CRM MME not only tracks response rates, it also lets you match sales revenues to specific campaigns, providing immediate cost vs sales analysis data.

## Manage Your Marketing Mix

Sage CRM enables you to manage and track every element of your campaign. View activities, objectives, leads

generated and lead follow-up. You can drill down to specific activities within a campaign including communications, opportunities, responses, budget, actual cost and lists of prospects. This in-depth view of your campaigns allows you to eliminate the guesswork and put your company's marketing resources to their best use.

## Control Your Telemarketing Campaigns

Sage CRM provides telemarketers with the tools they need for effective telemarketing. Calls can be automatically scheduled for the telemarketers and the outcome of the calls can trigger the development of the next stage of the campaign. Details of calls can be saved and shared throughout all departments for future reference. Call length and outcome recording capabilities are built-in, plus a connector to CTI allows all the call automation and recognition tools that your company has to be integrated into your CRM solution.

## Sage CRM Marketing Feature List

### Campaign Management

- Assign, schedule and track marketing activities within a campaign and view every detail of each campaign at a glance
- Drill down to specific activities within a campaign including communications, opportunities, responses, budget, actual cost and lists of prospects
- Segment your audience (based on product interest, demographics etc)
- Retain successful data for future campaigns

### Segmentation & Groups

- Segment customer and prospect lists using user-friendly tools
- Deliver targeted messages to select groups or target audience
- Export marketing lists to Microsoft Excel for external agencies

### Outbound Call Management

- Easily integrated into any marketing campaign

- Target lists and calls can be allocated and scheduled
- Schedule follow-up calls at times convenient for prospects and customers
- Details of calls can be saved and shared throughout the company

### E-mail Management

- Make it easy to distribute mass e-mail by providing the ability to send HTML e-mail, create e-mail templates and send attachments
- Store all communications about a particular campaign, so that employees can easily look up the exact e-mail message received by a specific customer or prospect

### Campaign Reporting

- Get real time information into the success of individual and ongoing campaigns by tracking them from initial lead generation right through to close
- Match sales revenues to specific campaigns, providing immediate cost vs sales analysis data

- Analyse marketing campaigns by lead source using user-friendly tools and reports

### Lead Management

- Qualify leads into your chosen criteria for follow-up
- Prioritise leads ensuring a lead never gets lost or goes cold
- Lead tracking enables you to view the lead at every stage

### List Management

- Create target lists from selected criteria, re-use successful campaign lists or import mail house lists
- Merge documents with target lists for mass mailouts
- Create interactions, record marketing pieces sent for future reference

## How Sage CRM Benefits Customer Service Users

### The Every Day Tools for Customer Service

Sage CRM gives customer service staff the tools to develop real, lasting and beneficial relationships with customers. There is no better example of a department where the right technology and approach can transform a cost to the business into a potential profit center than in customer service. It is with this in mind that Sage CRM was built to deliver the functionality, the cost of ownership and the ease of use to the middle market so that service excellence can be at the heart of everything.

### Resolve Customer Issues Efficiently

Sage CRM provides your customer service professionals with the tools they need to make their job simpler and more effective. With Sage CRM you can keep track of every customer interaction allowing your customer service teams to have the most up-to-date and complete customer information at their fingertips – information which helps them effectively and efficiently resolve service issues and creates cross-sell or up-sell opportunities.

### Empower Your Customers – Offer Multiple Channels

Sage CRM lets your customers help themselves by providing them with web access to their own 'customer portals' which can be accessed at their convenience 24/7. These password protected self-service areas on your website allow customers to log queries, make service requests, view the status of existing or past requests – anything that they would find useful. This customer self-service area on your website can be easily customised to incorporate the look and feel of your company website, ensuring that your company's brand remains consistent through all customer touch points.



### Find the Right Information Quickly

Sage CRM allows for the pooling of all transactions and communication history into a single screen. Sage CRM gives customer service professionals a 360 degree view of customers. With user-friendly tools you can access relevant customer data including purchases, call and escalation histories, interactions, e-mails and documents sent and received. All this customer information is stored in one central location allowing customer service professionals from any office location to access and share vital customer information. Armed with this customer knowledge you can handle customer queries more efficiently, which in turn enhances and strengthens the customer experience.

### Integrate with Back-End Solutions for Deeper Knowledge

Sage CRM integrates with leading back office applications so Account Managers can access key customer information such as credit status. Account managers can view current product information, pricing and discounts to capitalise on potential cross-sell and up-sell opportunities when interacting with customers.

“Now, we’re able to measure the success of marketing activities, including exhibitions, e-mail marketing and direct mail.”

**Barry Fielder**, Finance Director for Dowlis Corporate Solutions

## Sage CRM Customer Care Feature List

### Case Management

- Capture and track every interaction with every customer regardless of customer touch point or channel of communication
- Maintain a complete case history with instant access to all previous issues and customer interactions

### Activities & Communications

- Assign, schedule and track phone calls and meetings and view records of previous meetings
- Send e-mails (plain text or HTML) and attachments and record communication for future reference
- Attach documents – white papers, quotes, literature from the document library

### Reporting

- View and measure call turn around time and understand what is taking longer to resolve and why
- View issues by category, outstanding and unresolved issues

- Pull graphical reports for weekly, monthly and quarterly management meetings

### Knowledge Management

- Share customer information internally or externally to allow customers and partners to resolve their own issues
- Build a library of solutions to common customer issues to help the customer service team resolve issues faster

### Customer Self Service Portal

- Provide your customers with web access to their own ‘customer portals’ which they can access at their convenience 24/7
- Empower customers to log queries, make service requests, view the status of existing or past requests
- Customise your self-service portal to match the look and feel of your corporate identity, ensuring your corporate brand is kept consistent through all customer touch points

### Escalation & Notification

- Set up rules to automatically escalate cases if not closed within a certain time period
- Receive notifications automatically when cases are not resolved within a certain amount of time
- Receive notification instantly through e-mail, web browser, phone etc

### Ticket Tracking

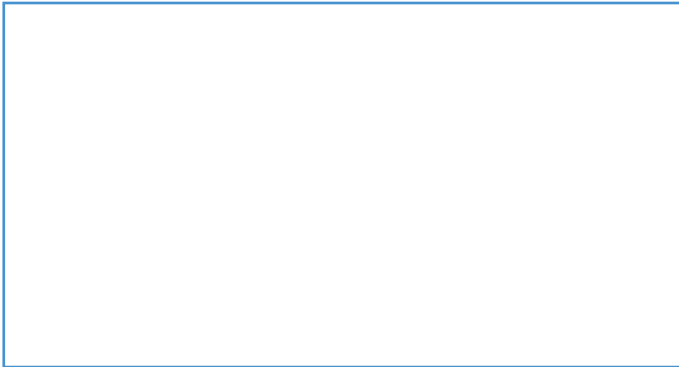
- Never lose an issue/service request in the organisation through tracking and recording of all requests through all stages of response
- All issues are date-stamped at time of resolution or escalation for internal management and for external auditing of service

### Success Rates

- The representative working on the ticket is always visible as are any later representatives or managers as the request is moved through the organisation ensuring the ownership and accountability over requests as they progress



For more information, please contact your  
Sage Business Partner:



Or contact the Sage Business Development  
Team to discuss how Sage CRM might help  
your company. Call

0845 111 99 88



Sage (UK) Limited  
Sage House  
Wharfedale Road  
Winnersh  
Wokingham  
Berkshire  
RG41 5RD

Tel: 0845 111 99 88  
E-mail: [customer.development@sage.com](mailto:customer.development@sage.com)  
[www.sage.co.uk](http://www.sage.co.uk)