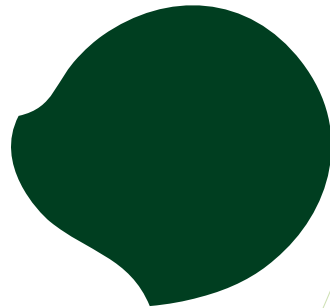


Sage CRM | White Paper

## Enhance Your Business Relationships With Sage CRM



## Accelerate Your Performance With True 360° Business Visibility

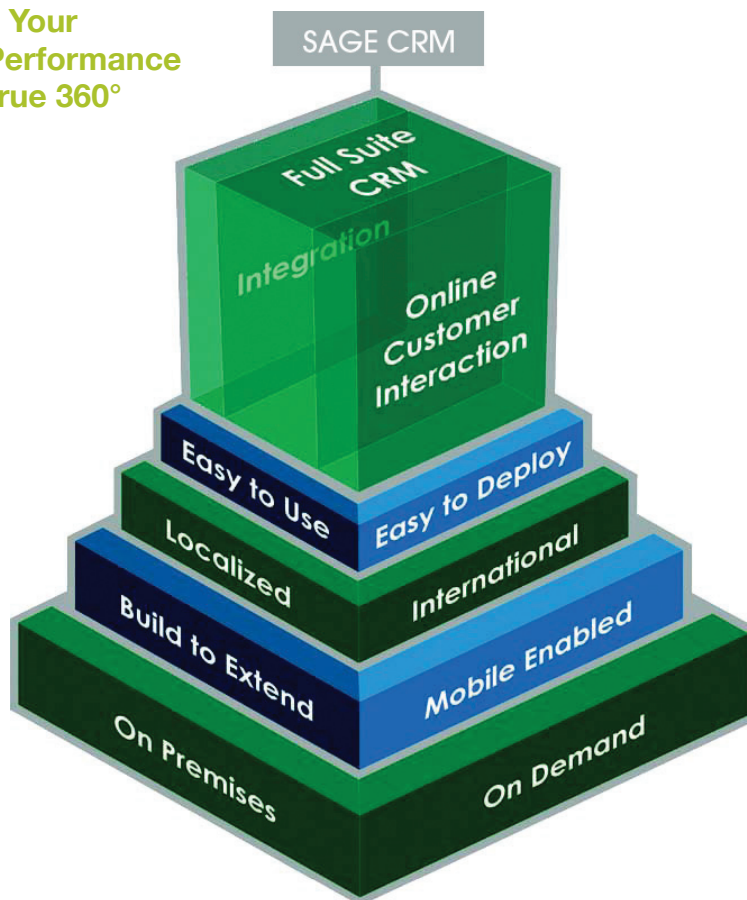
**Imagine:** Your top sales professional calls your best customer to sell him a new product. What he doesn't know is that the customer initiated a customer service ticket last week and did not pay last month's bill. Needless to say, the call goes badly.

**Same customer, different scenario:** This time, your sales professional and your customer service rep know everything there is to know about the customer and the health of the account. They know how much he's bought over the years, how timely his payments are, and how seldom he raises issues. So they work together to satisfactorily resolve his concerns and boost his confidence in your company. And, as a result, he pays his bill and agrees to consider purchasing the new product.

**Does the second scenario sound improbable?** It shouldn't. This is the power and effectiveness of Customer Relationship Management (CRM) solutions from Sage.

By integrating your sales, marketing, and customer service functions, Sage CRM makes it easier for everyone inside your company to work together and share critical information. Sales, marketing, and customer service teams gain the tools they need to find new customers, close sales faster, and build lasting, more profitable relationships. And thanks to out-of-the-box integration with ERP solutions such as Sage 100 ERP (formerly Sage ERP MAS 90 and 200) and Sage 300 ERP (formerly Sage ERP Accpac), Sage CRM lets you view critical customer data from the back-office and provides your staff with true 360° visibility into customer interactions, differentiating Sage CRM from many other CRM solutions in the market today.

### Accelerate Your Business Performance and Gain True 360° Visibility



## Sage CRM

### Benefits to your business:

- Empower your staff with enterprisewide access to vital customer, partner, and prospect information
- Manage and synchronize sales, marketing, and customer care activities across all points of interaction
- Automate key aspects of the sales cycle and analyze, forecast, and report on key sales data
- Create, schedule, and track marketing campaign activities, and measure the performance of every campaign
- Deliver outstanding customer service, ensuring customer loyalty and repeat sales
- Gain valuable insight into customer trends to guide strategic business decisions
- Deploy in the way that best fits your organization, increasing user adoption and providing flexibility
- Access critical customer data anytime, in the office, on the road, or from your mobile device
- Integrate with leading Sage back-office solutions for a 360° customer view

## Features

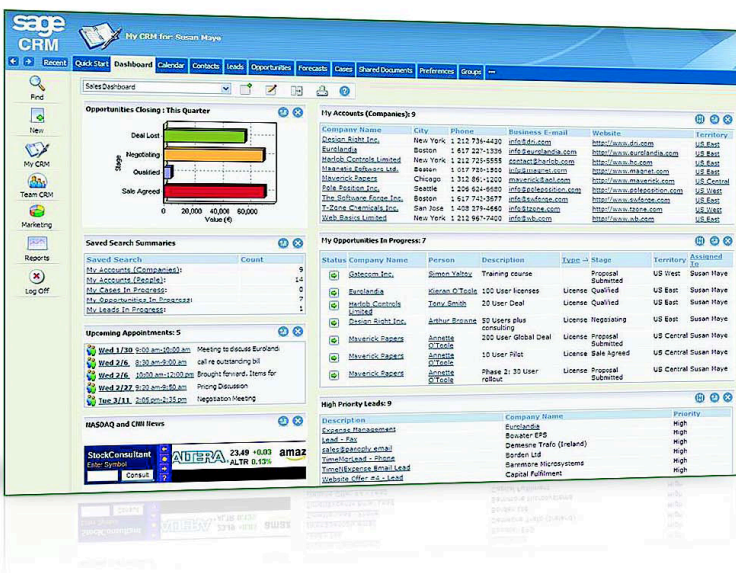
- **Sales force automation**
  - Account and contact management
  - Opportunity and lead management
  - Calendar and activity management
  - Sales forecasting and reporting
  - Quotes and order entry
  - Territory management
  - Process and workflow automation
  - Escalations and autonotifications
- **Marketing automation**
  - Campaign management and reporting
  - Outbound call and email marketing
  - Lead and list management
  - Customer segmentation capabilities
  - Detailed campaign analysis
- **Customer care automation**
  - Case management
  - Reporting
  - Ticket tracking
  - Knowledgebase
  - Workflow automation
  - Customer communication management
  - Customer self-service web portal
- **Microsoft® Outlook® integration**
- **Web and mobile access**
- **Offline synchronization**
- **Out-of-the-box integration with Sage 100 and 300 ERP**
- **Computer telephony integration (CTI)**
- **Automated workflow**
- **Configurable/customizable**
- **Easy to deploy and maintain**
- **Flexible deployment options**

“[Sage CRM] contains a broad set of Customer Relationship Management features that most small enterprises will value, has flexible deployment options, and is relatively easy to use and configure.”

— Info-Tech Advisor Premium Review, July 2007

## Gain Insight and Strengthen Relationships

Award-winning Sage CRM delivers rich CRM functionality with a low total cost of ownership (TCO) to small and midsized organizations.



- Gain instant access to all the relevant customer data you need through user-friendly navigation.

**Free 30-Day Trial:** Try SageCRM.com free for 30 days. Visit [www.SageCRMSolutions.com](http://www.SageCRMSolutions.com) to sign up today.

### Sales Force Automation

Sage CRM puts you in complete control of your sales pipeline, allowing you to effectively manage, forecast, and report on all phases of the sales cycle. With Sage CRM sales, you can easily access and analyze all current and historical account details and activities, manage multiple accounts and opportunities, and automatically distribute leads to sales professionals in the office or around the world. Point-and-click graphical reporting offers your sales teams access to real-time data for on-the-spot analysis and evaluation, enabling them to instantly identify their best opportunities.

### Marketing Automation

Sage CRM provides a rich 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 customers at the right time, eliminate guesswork, and put your marketing resources to their best use. You can easily schedule and track marketing activities within a campaign and view detailed information on each campaign for reporting and ROI analysis.

### Customer Service Automation

Sage CRM helps you to make the most of every customer interaction, maximizing business opportunities and customer satisfaction by tracking customer interactions and automating critical workflows. 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, support cases, email and documents sent and received, sales opportunities, and more. Customer service staff have access to the information they need to effectively resolve customer inquiries or issues on the first call, providing your customers with greater confidence and satisfaction.

### In-Depth Reporting

The Sage CRM dashboard feature allows you to organize your data according to your personal preferences. The Sage CRM dashboard enables you to:

- View customer and personal data the way you want to, when you want to.
- Access information easily.
- Analyze data on the fly through instant reports.
- Review pipeline status quickly.
- Review support case details at a glance.
- Integrate external data sources such as news feeds of relevant information.
- View key performance indicators at a glance.

The dashboard is particularly useful to senior management or any users who require higher-level views of information. Even financial information can be displayed on the Sage CRM dashboard for immediate insight into how the business is performing.

### Tight Integration With Your Back Office

Sage CRM provides out-of-the-box integration with leading Sage ERP applications, breaking down departmental silos, connecting your front office and back office, and providing total visibility and control across your business. It delivers a 360° view of your customers and your business for deeper insight into how your customers are interacting with you and how your business is performing. It also facilitates straight-through automated processing, which significantly reduces errors and administrative costs.

Over the long term, companies using the front- to back-office integration capabilities within Sage CRM can expect to significantly decrease administrative costs, increase customer satisfaction and revenue opportunities, and build sustainable competitive advantage in an increasingly challenging marketplace.

“It’s been smooth sailing. The biggest gain is the ability to share customer and prospect databases with users. We want to better manage leads and accomplish sales growth, which we are seeing as a result of Sage CRM.”

— Information Systems Manager,  
YoCream

## Increase Productivity and Improve Collaboration

Sage CRM offers flexible customization options, automated process workflow, mobile device access, computer telephony integration (CTI), web self-service, and more, so you can improve productivity and differentiate your business from the competition.

### Automated Process Workflow

With the powerful workflow tools in Sage CRM, you can embed and automate your best practices for sales, service, and marketing. Through an intuitive graphical user interface, Sage CRM lets you design and modify the stages and steps of your preferred business processes, define the underlying business rules, and automate their execution. Automating workflows enables your staff to benefit from proven, repeatable processes, freeing them to focus on growing the business instead of being bogged down by cumbersome, time-intensive manual activities. With Sage CRM workflow tools, you can also implement support escalation processes based on predefined service level agreements, creating confidence among your customers that their issues will be addressed quickly and effectively.

### Customization Capabilities

Sage CRM includes easy-to-use configuration tools, which allow you to quickly modify many aspects of the system and adapt the software to match your business. The open architecture of Sage CRM minimizes your development and maintenance costs and enables straightforward integration with other mission-critical applications. Its simple onscreen tools allow you to create and modify fields, screens, tabs, tables, views, and scripts on the fly.

### Options for Extending the Solution

Extend the rich functionality of Sage CRM through add-on and third-party complementary solutions that help you tailor Sage CRM to your unique business needs.

### Computer Telephony Integration

You can combine the power of Sage CRM with interactive inbound and outbound telephony automation through an optional add-on solution. The complete history of a customer's communication and interaction with your company is viewed through automated screen pop functionality, including faxes, personal visits, phone calls, and emails, giving support employees instant access to customer data from across the organization. Full onscreen autodial and phone functionality allows your support staff to perform tasks through the system interface rather than the phone system.

### Mobile Device Access

Wireless connectivity with enhanced support for Personal Digital Assistant (PDA) devices using the Microsoft Windows Mobile® operating system brings real-time data to your fingertips—anywhere, anytime. PDA users can stay productive and connected with a full range of functions, enabling them to access and update contacts and sales opportunities or schedule activities and appointments while on the road.

### Web Self-Service

Sage CRM web self-service lets your customers access information or request support over the web whenever they want. Through Sage CRM web self-service, you can provide your customers and partners the convenience of online access to critical account information anytime, anywhere.

## Sage CRM

“The greatest thing about Sage CRM is the way it ties everything together for us . . . This has streamlined our administration by 20 percent—and made our fans much happier.”

— Database Marketing Manager,  
Buffalo Sabres



### On-Premises vs. On-Demand Sage CRM

With Sage CRM, you have the freedom to choose a solution that best fits your unique business requirements. Select from flexible deployment methods (on-premises or on-demand over the web) 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-premises through seamless migration options.

Sage CRM is an easy-to-use, fast-to-deploy on-premises CRM software solution with out-of-the-box but configurable business process automation. It provides enterprisewide access to vital customer information, so you can better manage your business with an integrated approach to field sales, inside sales, customer care, and marketing.

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

“We knew that if we could centralize all information, we would increase service levels, optimize sales force efficiency, improve accuracy and inventory control, and streamline just about every other business process.”

— Director of Information Systems, Source Technologies

## 360° Business Visibility Boosts Performance and Competitive Advantage

Informed employees make empowered employees. And empowered employees create satisfied customers. That's what Sage CRM does, breaking down the walls between employees and departments so everyone has a complete view of all customer interactions. It's this tight integration that enables everyone in your organization—from sales and marketing to accounting and finance to customer service and shipping—to work together, efficiently, in the business of building profitable customer relationships.

Whether it's seeing a complete view of customer interactions to make the most of current and emerging opportunities, managing the business more effectively through insight garnered from in-depth reporting, or maximizing productivity with flexible deployment methods and configuration capabilities—Sage CRM helps you achieve a significant competitive advantage and greater success.

Sage CRM is part of Sage, a leader in business management solutions worldwide, so you can feel confident that as your business grows and changes, you'll continue to find solutions to meet all your business needs.

## About Sage

Sage is a leading global supplier of business management software and services for small and midsize businesses. The Sage Group plc, formed in 1981, was floated on the London Stock Exchange in 1989 and now employs more than 12,600 people and supports more than 6 million customers worldwide. For more information about Sage in North America, please visit the company website at [www.NA.Sage.com](http://www.NA.Sage.com). Follow Sage North America on Facebook, <http://www.facebook.com/SageNorthAmerica>, and Twitter, <http://twitter.com/#!/sagenamerica>.

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