Sage CRM | Focused Sales Management

Equipping your sales team with the complete customer information and the necessary tools to enable them to do their job effectively is very important. Sage CRM empowers organisations to sell effectively. Easy-to-use, Sage CRM provides sales users with instant access to calendars, accounts, reports, pipelines, contacts and call lists, empowering sales people to sell. All sales information is stored, tracked and reported providing organisations with meaningful and up-to-date information on the performance of the sales team.

The information is displayed on the Sage CRM interactive dashboard from where users can control and manage all activities. Users can choose to use the pre-installed sales dashboard available out-of-the-box or customise their own dashboard to create a bespoke workspace to suit their needs.

Graphics provide at-a-glance information to sales reps and sales managers on how they are doing at any point in time. Integration with leading Sage ERP systems gives sales staff access to both financial and non-financial customer data, for a complete 360 degree view of the customer across front- and back-office departments.

With Sage CRM Sales Force Automation, real-time sales opportunity analysis is provided instantly. Sage CRM provides a snapshot of all opportunities within the sales pipeline, allowing sales teams to effectively analyse and manage deals at every stage. The sales process is automated, streamlining your business and enabling better business management. The most up-to-date and complete customer information is instantly and easily retrievable within Sage CRM through the interactive dashboard helping users to have a better view of their customer at all times.

With Sage CRM, opportunities can be tracked in real-time and assigned to members of the sales team to action accordingly.

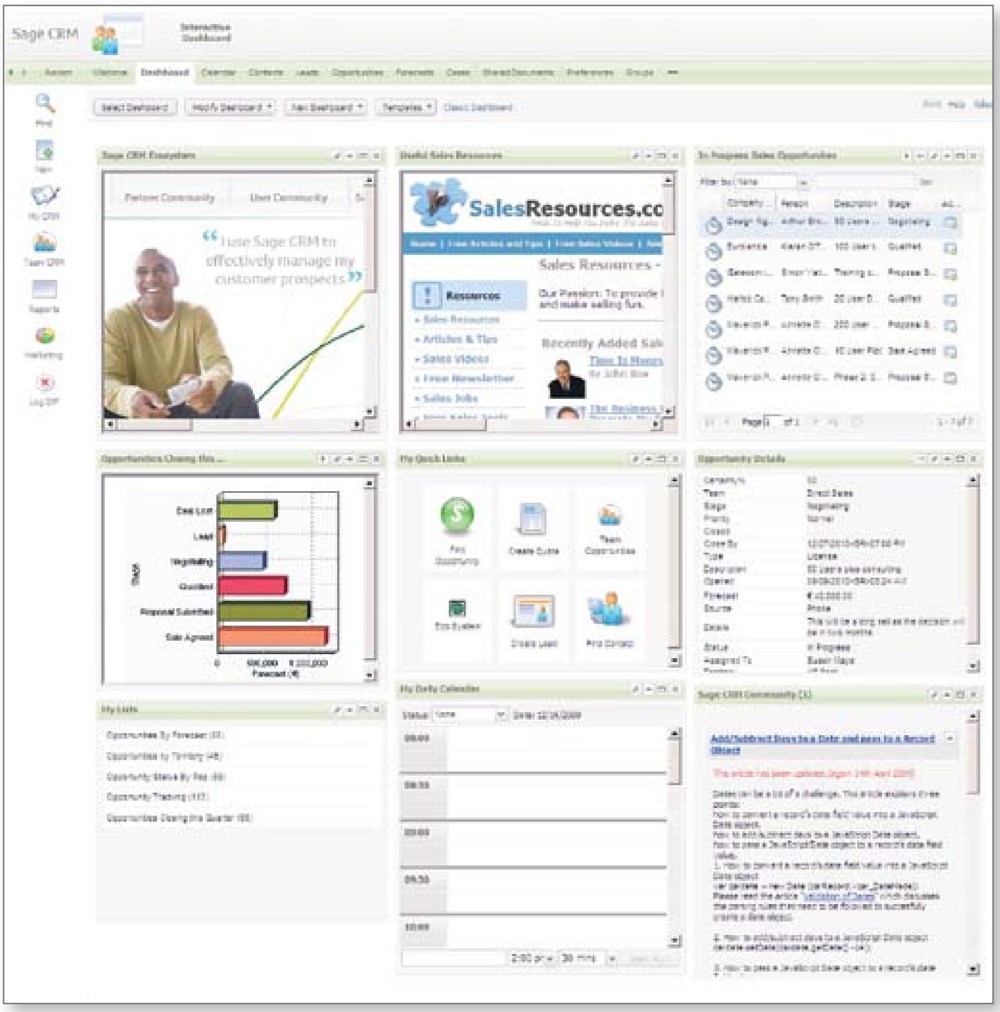
Benefits Snapshot

- Improves transparency in the sales pipeline
- Enhances sales forecast accuracy
- Monitors progress against quota
- Enables quarterly sales performance monitoring
- Leads to shortened sales cycles
- Increases prospect-to-customer conversion rate
- Delivers metrics on most valuable customers
- Improves consistency across the sales organisation
- Enables more effective identification of new market opportunities
- Maximises cross and up-sell opportunities
- Eliminates manual/duplicated sales processes
- Improves team collaboration on opportunities
- Decreases time spent on administrative tasks
- Improves prospect targeting
- Provides visibility on sales team performance including identifying sales opportunities and pipeline potential
- Increases visibility on customer interaction across departments and activities
- Automates proposal and quotation processes
- Leverages financial information from the back-office system
- Reduces time spent in the office on sales administration (more time on sales calls)
- Increases sales effectiveness through the ability to access and download customer information remotely or offline
- Boosts sales team productivity by delivering a single view of leads, opportunities, tasks and activities on the interactive dashboard

The Interactive Dashboard

Sales teams work more efficiently thanks to the interactive dashboard. This is an intuitive and customisable workspace from which they can manage all their daily tasks and activities for maximum productivity. The interactive dashboard can be customised to display relevant information from within Sage CRM, feeds from websites and information from integrated Sage ERP system. A pre-installed sales 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.

The sales team can monitor their opportunities and pipeline, manage their calendar and appointments, and identify powerful networking opportunities from LinkedIn® all from this customisable workspace. This removes the need for users to switch between screens, maximising the efficient use of their time and boosting productivity. Content and layout can be customised quickly and easily using drag and drop capabilities delivering a rich and personalised user-experience.



Sage CRM's interactive dashboard provides the sales team with an intuitive and customisable workspace from which they can better serve their customers and key accounts

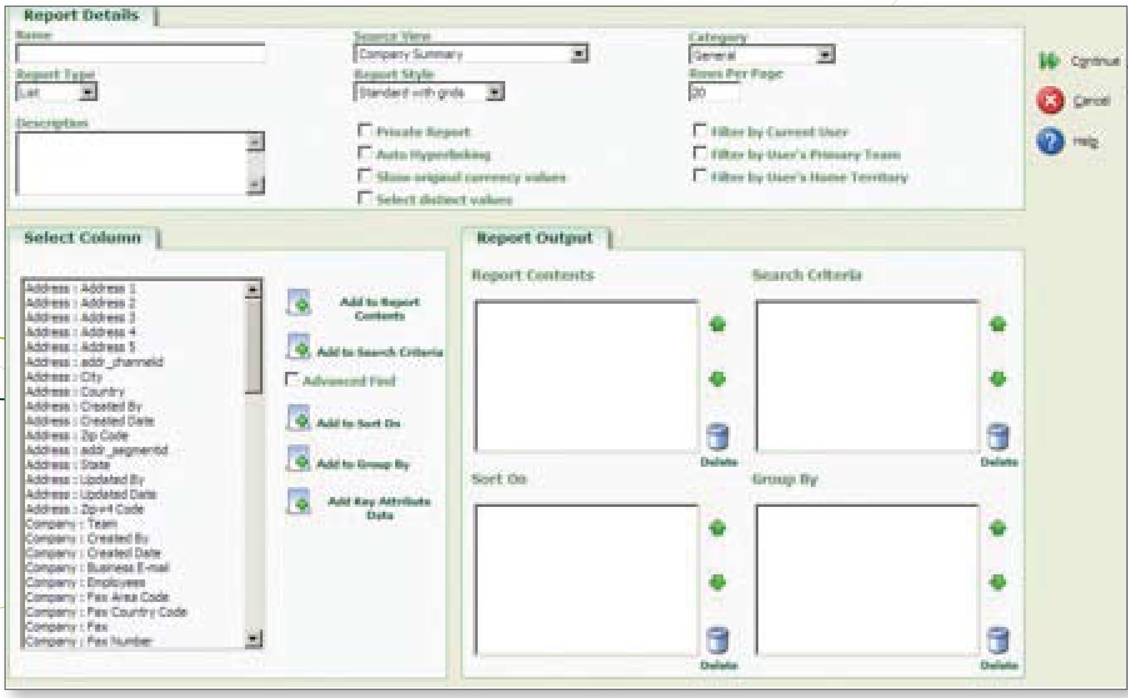
Management of Opportunities and Leads

Using Sage CRM sales users can track leads from first contact to final sales closure. This ensures that time and resources are invested into the deals that are most likely to close and enables the sales team to easily identify and recruit new customers and resell or up-sell to existing accounts. With Sage CRM leads can be escalated and reassigned easily from the interactive dashboard, follow-up activities can be automated and field-level security is a simple and straight-forward process. It also guarantees that leads are handled by the employees most qualified to assist the client and only relevant parties are privy to information. Sage CRM permits sales reps and managers to effectively analyse and manage the sales pipeline, with the ability to see and report on leads, opportunities and proposals at a glance.

Sales Forecasting and Reporting

Sage CRM provides point and click reporting and graphs along with accurate and timely forecasts which are accessible by sales representatives and managers alike. This enables easy sales forecasting and reporting and provides sales teams and management access to data for immediate analysis and decision-making. Sage CRM provides sales managers with access to data for immediate analysis and decision-making. Custom reports can be created on-demand using the reporting wizard for real sales performance insight. It is also possible to use system default reports or easily create new reports with the aid of a reporting wizard. Sage CRM provides detailed business insight data as well as graphical interpretations on the state of the business at any moment in time allowing businesses to strategically plan and gain insights on future performance.

This powerful analytical information can be displayed on the interactive dashboard in a graphical format that makes sense to senior sales executives; allowing them to monitor team performance, identify issues and make strategic decisions; all in real-time. Dashboards can also be fully customised to deliver even further strategic value to senior decision-makers.



With Sage CRM, it is easy to design customised reports.

Quotes and Order Generation

With Sage CRM, the most up to date quotes are delivered with access to the latest product information. This maximises efficiency, reduces the margin for error and professionalises communications with customers and prospect customers. Sage CRM has functionality to automatically generate sales proposals and quotes using predefined templates enabling sales executives to generate compelling, comprehensive and accurate proposals quickly and efficiently.

Territory Management

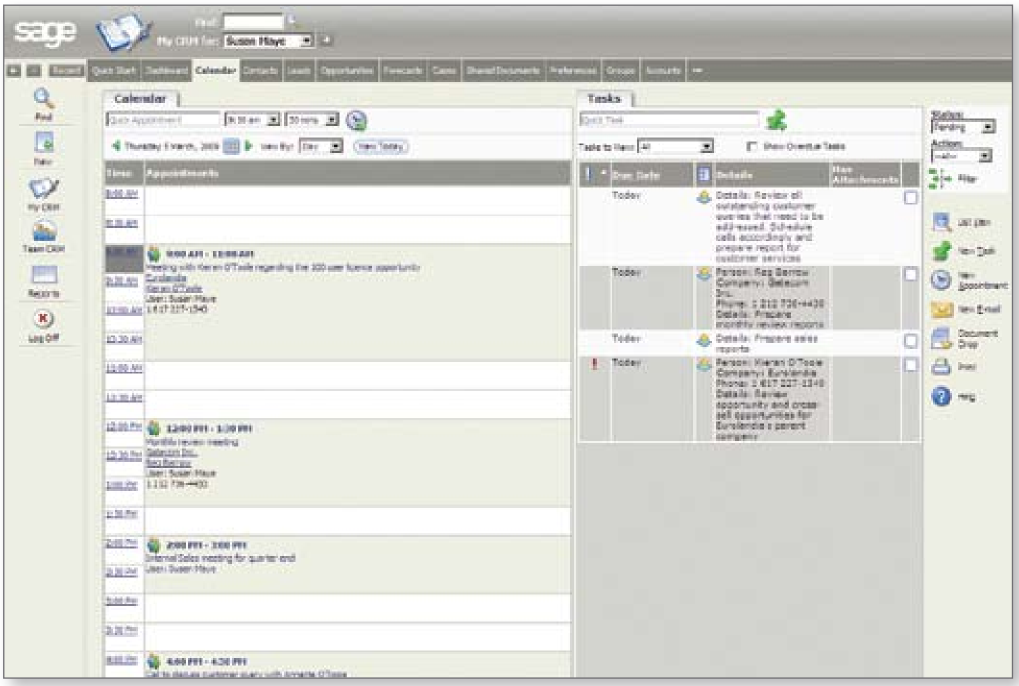
With Sage CRM, assignment rules automatically route leads to the relevant sales representatives based on territories. It is possible to create new teams and re-assign ownership of teams as well as view marketing campaigns, response rates and associated sales revenue by territory. This feature in Sage CRM delivers insight into sales effectiveness and performance by territory.

Sales Process Automation

Vital customer and prospect information can be retrieved quickly and easily using Sage CRM. Time is organised and administrative tasks are reduced to a minimum. In Sage CRM, the sales process is automated to enable users to concentrate on their primary purpose which is selling. The in-built workflow can be followed out-of-the box or customised to reflect your business process. The automation in Sage CRM means that all sales users follow the same steps, ensuring no opportunities 'fall through the cracks'. The sales process can be structured to suit your internal business process for maximum effectiveness. Sage CRM also delivers periodic messages to sales managers summarising critical opportunity and forecast information for their direct reports. This ensures business opportunities are always retained and worked on. The sales team can control and manage their working day from the interactive dashboard, reducing the need for them to switch between screens and maximising use of their time.

Calendar and Diary Management

Sage CRM provides sales users with a complete diary solution with daily, weekly and monthly views. In addition, onscreen reminders and notification alerts are available to all sales team members. This increases efficiency, punctuality and convenience for the sales team. It is also possible to run e-mail, calendars and contacts through Microsoft Outlook and all interactions can be automatically synchronised with Sage CRM, meaning that contacts, tasks and appointments are automatically updated in both systems. This synchronisation of information fosters organisational transparency within the business and enhances the quality and retention of information available to the user. The calendar can be managed from the interactive dashboard ensuring that appointments and tasks are managed with ease.



Sage CRM calendar management provides sales executives with a complete diary solution allowing the sales team to effectively keep track of client visits, pipeline meetings and routine tasks.

Anytime Anywhere Workforce

Sage CRM provides the sales team with the ability to work wherever they are located around the world. This ensures that they have fast, up-to-date access to critical customer data especially for sales staff that are often out on the road. Sage CRM supports online access to the system from a browser, enabling users to access critical real-time customer data while on the move via the internet. Screens can be customised by the system administrator using the regular Sage CRM screen configuration area.

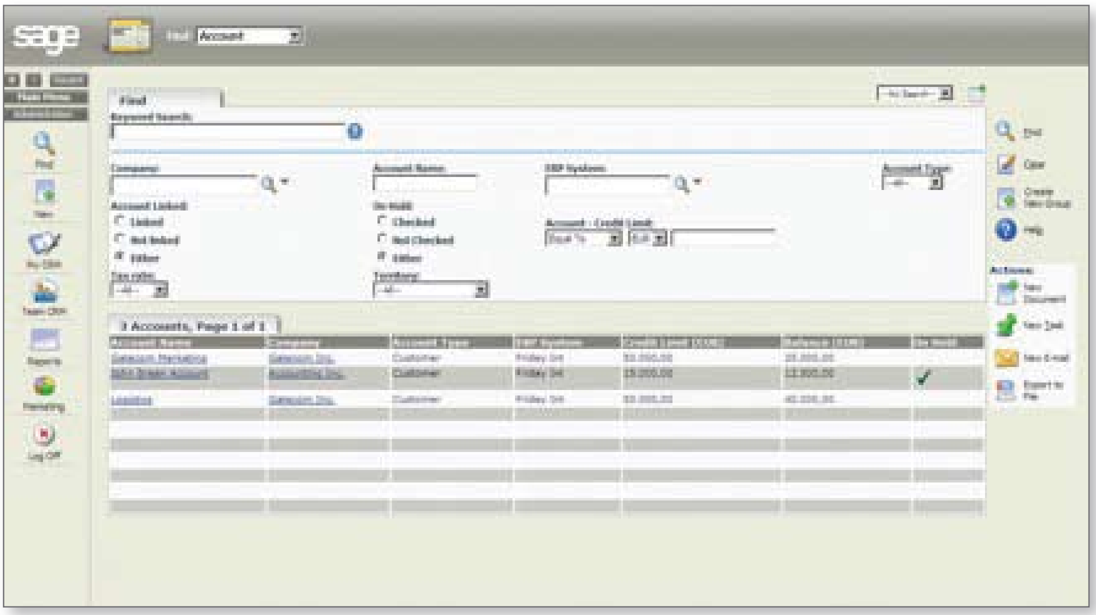
"Sage CRM supports a culture of constant progress. With Sage CRM, the next step is automatically built into the process, so we're always moving forwards together to make the most of sales opportunities and build closer customer relationships. It reinforces the rigorous discipline of how we need leads 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.

ERP Integration

With Sage CRM and ERP integration, sales executives have access to customer data from the back-office allowing a true single view of the customer. This ensures that the sales executive is 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. Information from the Sage ERP system can be displayed directly on the interactive dashboard for quick and easy access, equipping teams with powerful information to provide your customers with a consistent and exceptional service.

For example, sales staff can easily check the availability of stock across different locations and can check the real-time status of orders without having to rely on multiple, disparate systems or consulting colleagues who may not be available. This enables sales staff to give accurate information to customers without delays, and thereby improving customer service and driving customer loyalty.



With Sage CRM and ERP integration, the sales team are equipped with the most accurate information to enable them to service their customers effectively.

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 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 across front-and back-office functions, 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 5.8 million customers
- Over 14,500 employees
- Over 30,000 Sage-certified partners specialising in business applications
- Direct presence in 26 countries
- Relationships with over 40,000 accountancy practices
- 28 year's experience
- Over 3.1 million Sage CRM Solutions users worldwide

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