



SalesLogix

Marketing Datasheet

Sage SalesLogix Marketing is a module within the Sage SalesLogix customer relationship management (CRM) application. Other modules include Customer Service, Support, and Sales. Sage SalesLogix also supports Mobile users.

Building lasting and profitable customer relationships means executing effective, timely marketing campaigns across all of your sales channels. It's critical that your company's marketing resources are put to their best use.

Sage SalesLogix Marketing provides full-scale marketing campaign management capabilities, including targeted customer segmentation, multi-channel marketing communications, and real-time reporting, designed to target your most profitable prospects and customers and shorten your sales cycle. Capturing rich, timely data from customer interactions across your organisation allows you to develop and execute meaningful marketing programmes that drive results.

Sage SalesLogix Marketing segmentation capabilities enable you to execute highly-targeted marketing activities. Execute multi-channel campaigns, such as email marketing, targeting your prospects and customers with the most effective message and medium. Leads generated by campaigns are tracked within Sage SalesLogix and qualified based on the criteria you define.

Most importantly, Sage SalesLogix delivers critical marketing intelligence, like return on investment (ROI), for your marketing campaigns, so you can focus your strategy and resources on programmes that deliver results for your business.

Features at a glance:

Sage SalesLogix Marketing provides powerful capabilities for managing, tracking, and measuring targeted marketing campaigns.

- Campaign Management
- Segmentation & Groups
- Lead Management
- Web Lead Capture
- Lead Qualification
- Workflow Automation
- E-Mail Marketing
- Campaign Response Tracking
- Campaign Task Management
- Budget & Revenue Tracking
- Campaign Reporting (ROI)
- Marketing Resource Library
- Windows & Web Access

The screenshot displays the Sage SalesLogix Marketing campaign dashboard for a campaign named "Trade Show - Chicago". The interface includes a navigation sidebar on the left with icons for Marketing, Campaigns, Contacts, Campaigns, Activities, Calendar, Library, Reports, and Leads. The main content area is divided into several sections:

- Campaign Details:** Shows Campaign Name (Trade Show - Chicago), Description (Annual Expo), Objective (100 New Leads), Call to Action (Call for Demo), Lead Source (Trade Show - General), Product (GoNote Laptop 3000W), Status (Active), Code (TS), Start Date (6/21/2006), End Date (7/21/2006), Manager (McNulty, Brian), and Owner (Everyone). A "Launched" button and "to 527 Targets" are also visible.
- Responses:** A table listing 11 responses with columns for Name, Lead Source, Type, Response Date, Response Method, and Comments. Responses include contacts from Aicewa, Varita, Anderson, Garcia, Balentine, Mark, Browner, Betty, Davidson, Mike, Gallagher, Jerry, and Gatzke, Rick.
- Budget Results:** A table comparing Budget, Actual, and Variance for Task Costs, Expenses, and Calculated Cost. It also includes a "Response" table with metrics like Contact Response Qty, Contact Response Rate, Lead Response Qty, and Lead Response Rate.
- Cost Metrics:** A table showing Budget, Actual, and Variance for Cost / Target, Cost / Response, Cost / Opp, and Cost / Sale.
- Opportunities:** A table showing Open Potential, Open Weighted, Actual W/opp, and Actual Lost, along with their respective % Rate and Qty.

Create and track every component of your marketing campaigns easily in one quick-read window with the Sage SalesLogix Marketing campaign dashboard.

Benefits

- Design marketing campaign goals and activities
- Segment customers and prospects for effective targeting
- Deliver high-impact marketing communications
- Increase lead conversion rates by qualifying based on your criteria
- Automate campaign activity scheduling and follow-ups
- Assign “hot” leads based on your business rules
- Track campaign success by lead source
- Analyse ROI and increase marketing effectiveness

*Sage E-Marketing is an optional component.

Identify Profitable Customer Segments

Select the criteria of your ideal target prospect, then segment your customer and prospect lists into unique groups. With Sage SalesLogix Marketing, you can find the most responsive audience for your campaigns, and increase your revenues.

Build and Launch Multi-Channel Campaigns

Define campaign stages, targeting your prospects through multiple media. For example, execute email marketing activities with Sage E-Marketing, an integrated marketing services provider. Email response data is automatically transferred to Sage SalesLogix. Also, import leads from all other campaign activities, and qualify them based on your chosen criteria.

Manage Campaigns End-to-End

Manage and track every component of your campaigns from within the Sage SalesLogix Marketing campaign dashboard. View campaign stages, tasks, objectives, calls-to-action, and budgets. You can also view response rates and forecasted vs. actual sales results in real time for each campaign from within a single view.

Measure ROI and Report Campaign Metrics

Sage SalesLogix not only tracks response rates and ties revenue to specific campaigns, but also enables you to analyse marketing campaigns by lead source, region, media type, and products sold, using flexible, built-in reports.

In addition, a record of every campaign communication is linked to the account history, so employees from Sales and Marketing to Customer Support and Accounting share a complete view of all account activity.

With Sage SalesLogix Marketing, you'll have every detail of your campaigns at your fingertips and the insight you need to increase the effectiveness of your marketing efforts and deliver sales results.

The screenshot displays the Sage SalesLogix Marketing Reports interface. The main window shows a report titled "Opportunity - By Leadsource". The report is filtered by "Leadsource: Telemarketing - General". The report lists several opportunities with their respective details:

Leadsource	Opportunity	Type	Sales Potential	Status	Actual Close
Dain Dickenson	Dain Dickenson-Phase1	Cold	\$ 699,000.00	Clos	1/8/0
	Flow Matic-Phase1		\$ 281,000.00	Clos	12/2
	Flow Matic-Phase2		\$ 281,000.00	Open	
Vegas Vision	Vegas Vision-Phase1		\$ 399,000.00	Open	
World News	World News-Phase 1			Open	

Evaluate the effectiveness of your marketing campaigns by analysing sales potential associated with each lead source.

Features

Campaign Management

- Design, execute, and track all campaign activities in one location
- Re-use past successful campaign profiles
- Launch custom contact processes to automate workflow for sales reps
- Deactivate expired campaigns and retain key data for future reference

Segmentation & Groups

- Deliver targeted marketing messages or sales offers to select customer segments
- Enable sales reps to quickly create groups for personalised sales campaigns
- Segment customer and prospect lists using user-friendly filtering tools
- Export data to Microsoft® Excel for additional analysis

Lead Management

- Import leads from web forms, trade shows, seminars, or purchased lists
- Manually create leads from cold calls or referrals
- Track leads at every stage, from lead through to closed sale

Web Lead Capture

- Capture prospect information via a company website and import lead data
- Launch marketing processes to schedule letters, calls or literature requests
- Gather valuable demographic data for use in segmentation and offer development

Lead Qualification

- Create qualification checklists using criteria you define
- Create unique qualification checklists for different products or services
- Click to convert qualified leads to new sales opportunities
- Merge duplicate leads with existing contacts and accounts

Workflow Automation

- Streamline marketing and sales campaigns by automating standard tasks
- Automatically archive letters, emails, faxes or proposals within customer account records

Email Marketing

- Execute email campaigns using Mail Merge or integrated marketing service provider, Sage E-Marketing (available separately)
- Upload target lists directly into Sage E-Marketing
- Pre-populate Sage E-Marketing with your company templates and content
- Transfer Sage E-Marketing response data automatically into Sage SalesLogix

Campaign Response Tracking

- View response data in real-time to analyse the impact of campaigns in progress
- Assess campaign metrics such as response ratio and associated sales revenue
- View or add campaign info or responses from within account or contact records

Campaign Task Management

- Coordinate and track the stages and tasks critical to executing effective campaigns
- Schedule task owners, assign dates, due dates and budget for each task

Budget & Revenue Tracking

- Gain critical visibility into campaign budgets and direct revenue impact
- View revenue in real-time as opportunities linked to campaigns are updated
- Track forecasted vs. actual budgets, including metrics such as cost per lead

Campaign Reporting (ROI)

- Analyse the effectiveness of marketing efforts (ROI) and increase efficiency
- Examine campaign data responses, associated revenue and product detail
- Evaluate potential vs. actual returns for each lead source, region or media type

Marketing Resource Library

- Maintain a central repository for marketing information, materials and tools
- Attach and send files from the Library in emails to customers and prospects

Windows & Web Access

- Capture or update campaign related information via the Internet
- Activate the 'Do Not Solicit' feature to exclude accounts from future campaigns

About Sage SalesLogix

Sage SalesLogix is the leading customer relationship management application that enables small to mid-sized businesses to cultivate profitable customer relationships by increasing sales and marketing performance and maximising customer satisfaction and loyalty.

Designed to meet the distinct needs of small to mid-sized businesses, Sage SalesLogix delivers integrated Sales, Marketing, Customer Service, Support, and Mobile automation software that adapts to your unique customer acquisition, retention, and development processes.

Flexible and easy to use, Sage SalesLogix readily accommodates growth and changing business requirements. It delivers deep, rich customisation capabilities, high levels of end-user adoption, and low total cost of ownership across all deployment methods including Web, Windows, and mobile devices.

With more than 300,000 users at over 8,500 companies worldwide, Sage SalesLogix is the leading CRM solution for small to mid-sized businesses and divisions of larger enterprises, and is part of the Sage family of integrated business management software.

About Sage

Headquartered in Newcastle upon Tyne, Sage (UK) Limited is a subsidiary of The Sage Group plc, a leading supplier of business management software and services to 5.4 million customers worldwide.

From start-ups to larger organisations, Sage makes it easier for companies to manage their business processes.

Formed in 1981, the Group was floated on the stock exchange in 1989 and now employs 13,000 people in its market leading companies worldwide.

Working with its community of UK accountants, business partners, developers, banks and retailers, Sage is exclusively focused on providing UK businesses in all sectors with specific, scalable software and services to help them manage their finances, their people, their customers, their suppliers, their core operations and to plan their future business success.

In the UK alone, Sage employs over 1600 people and provides software and services to over 700,000 small and medium-sized businesses.

These products range from accounts, payroll, forecasting and business intelligence to customer relationship management, e-business and help for start-ups. Services include Excel Support, HR Advice, Health and Safety Advice and training courses.

For more information, please visit **www.sage.co.uk/saleslogix**

Alternatively, contact your certified Sage SalesLogix Business Partner.

To find a Business Partner in your area call **0845 111 9988** or email **crm@sage.com**

To register for an online demonstration to see how Sage SalesLogix can help your business, go to: **www.sagecrmsolutions.com/demo/sagesaleslogix**

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