Sage CRM

Focused Sales Management

Make the most of every sales opportunity.

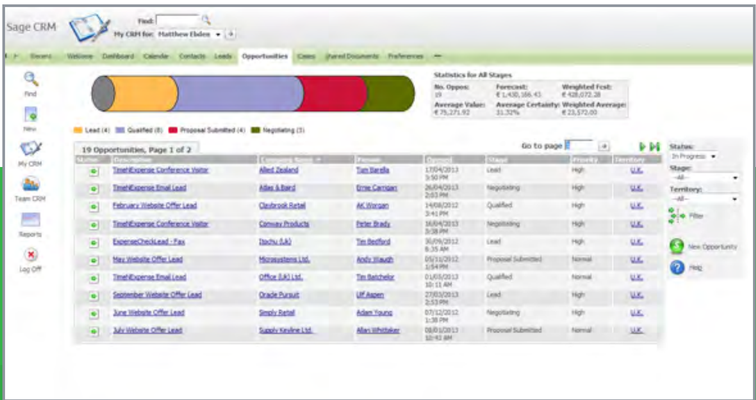
Sage CRM directs your sales efforts towards the most profitable, most winnable deals, and helps you make the most of cross-selling and upselling opportunities. With instant access to pipelines, calendars, sales reports, contacts, and much more, your sales people are freed up to focus all their efforts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

Automated workflow and pipeline management enable sales opportunities to be progressed quickly and efficiently, while data is effectively shared with and accessed by anyone who needs it.

Providing an end-to-end view of every opportunity from within one, easy-to-use screen, Sage CRM means an end to chasing around for information. Sage CRM gives full visibility of what is happening with every prospect and customer, simplifies forecasting, and strengthens pipeline management.

Integration with leading Sage ERP systems gives sales staff access to both financial and non-financial customer data, giving a complete 360-degree view of the customer across front and back-office departments.

With Sage CRM, sales activities are streamlined and tracked, and best opportunities are seen in real-time. Sage CRM provides a snapshot of all opportunities within the sales pipeline, allowing sales teams to effectively analyze and manage deals at every stage.



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

Benefits Snapshot

- Maximize the value of each and 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
- Enable quarterly sales performance monitoring and improve consistent practices across the sales organization
- Maximize cross and up-sell opportunities
- Delight each user with a great CRM experience with cross-browser and mobile access
- Leverage your financial information using back-office data within Sage ERP
- Reduce the 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
- Expand internal team collaboration using Sage CRM and Yammer


"We have, in the first three months of this fiscal year, achieved 60% of the prior year's sale."
Larry Leeds
CPA
Gibson Teldata
Indiana

The Interactive Dashboard

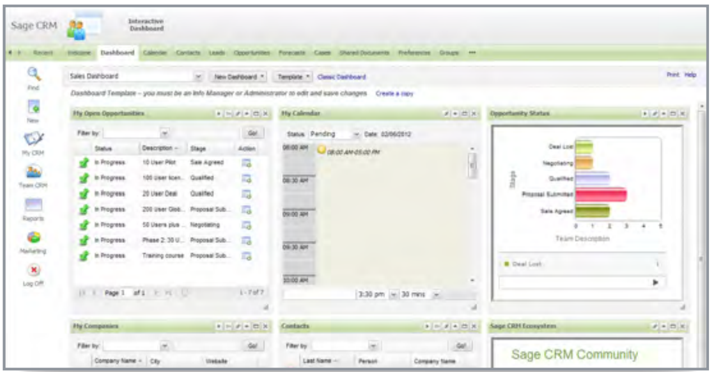
Sales teams work more efficiently thanks to the interactive dashboard. This is an intuitive and configurable workspace from which they can manage all their daily tasks and activities for maximum productivity.

The interactive dashboard personalizes the display of relevant information from within Sage CRM, and can feed websites and information from an integrated Sage ERP solution. Gadgets within the dashboard can be linked to provide a real-time view of multiple customer information.

A pre-configured sales dashboard is available out-of-the-box. Also, users can customize their own dashboard or or a team's 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 helpful networking opportunities from LinkedIn® , all from this customizable workspace.

A dashboard removes the need for users to switch between screens, maximizing the efficient use of their time and boosting productivity. Gadgets can be positioned and sized accordingly, providing users with maximum flexibility on the dashboard layout and delivering a rich and personalized user experience.



Sage CRM's interactive dashboard provides the sales team with an intuitive and customizable workspace to daily track their activities.

Management of Opportunities and Leads

Using Sage CRM, sales users can track leads from lead capture to close. This ensures that time and resources are invested into the opportunities that are most likely to close. Also, sales team can easily identify those customers that may be interested in additional products or services.

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 those employees who are most qualified and ensures that only the right users have access.

Sage CRM gives sales and managers new visibility to truly understand their pipeline and its opportunities. Reports, leads, opportunities and proposals are all seen at a glance so you can better manage towards each close.

Sales Forecasting and Reporting

Sage CRM provides the sales team with point-and-click reporting and graphs, along with accurate and timely forecasts.This enables easy sales forecasting, reporting, and better access to data for immediate analysis and decision-making. Data is easier to understand as Sage CRM uses graphs to present the state of the business at any moment in time. This allows businesses to strategically plan and gain insights on future performance.

Report charts are highly visual and can be incorporated into presentations for a professional look and feel. The charts are all configurable, or even customizable, so reports the information needed to make timely decisions.

Quotes and Order Generation

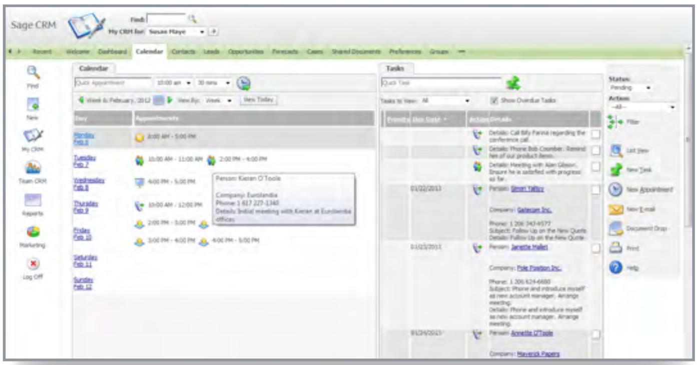
When Sage CRM is integrated with Sage ERP, you can create quotes that include the latest pricing and availability. Your sales teams can be quicker to respond to immediate sales opportunities while still reducing errors that impact customer satisfaction or even profits. Sage CRM can automatically generate these sales proposals and quotes using predefined templates, allowing your team to generate compelling, comprehensive, and accurate proposals quickly and efficiently.

"Sage CRM drives efficiency which is the same as profitability for a business like ours. Information is king. It gives us a level of reporting and a snapshot of each aspect of the business with a level of detail we didn't have before."

Jay Lentz,
Client Development Executive,
Lincoln Waste Solutions
Connecticut

Territory Management

When you create assignment rules in Sage CRM, leads are automatically sent to the right sales representatives based on territories. You can also create new teams and re-assign ownership of teams, and view marketing campaigns, response rates and associated sales revenue by territory.



Sage CRM provides sales teams a complete calendar view of client visits, pipeline meetings and routine tasks.

Sales Process Automation

In Sage CRM, daily sales activities are streamlined so your team can concentrate on their primary job, which is to sell! The workflow tools can be set up out-of-the box and configured to reflect your way of doing business. "Automation" in Sage CRM means that all sales users follow the same steps, ensuring no opportunities "fall through the cracks". The workflows you need to have in place can be quickly set up so you can focus your best sales opportunities.

Sage CRM also delivers periodic messages to sales managers summarizing critical opportunity and forecast information. These reports ensure that the business opportunities are always noticed and prioritized.

Communications Management

Sage CRM provides sales users with a complete calendar solution with daily, weekly, monthly and yearly views. On-screen reminders and notification alerts are available to all sales team members increasing efficiency, punctuality and convenience.

This synchronization of information fosters organizational 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 delivers a seamless calendar management experience thanks to real-time synchronization between Sage CRM and MS Exchange. This enables mobile users to access up-to-date appointments, tasks and contacts within Sage CRM on their smartphone, laptop or desktop PC for maximum ease-of-use and productivity.

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 optimized as a result. There is less potential for delay, for a misunderstanding, or an error to occur.

Information from a Sage ERP system can be displayed directly on the interactive dashboard for quick and easy access. For example, sales staff can easily check the availability of stock across different locations. They can check the real-time status of orders without having to rely on multiple, disparate systems or consult other employees who may not be available. This enables sales staff to give accurate quotes to customers without delays, and thereby improving customer service and driving customer loyalty.

Anytime, Anywhere Workforce

Sage CRM enables mobile sales teams to access their important customer information from the latest mobile devices. Native apps for the iPhone and Windows 8 devices provide mobile sales teams with real-time data to help them manage their business relationships wherever they are, even when out of cell phone coverage.

Sage CRM equips the sales team with the customer information they need while on the move.

About Sage CRM

Sage CRM is designed to help small and medium sized businesses like yours. It is easy to use, adapt, configure, learn and manage for companies who want to focus on their business, not on their software.   And critically, it's affordable, offering you the best possible value. Available on-premise or in the cloud, Sage CRM provides the tools to quickly automate business workflows. When integrating with Sage ERP, you can enjoy more business insights, greater efficiencies, and a single, customer-centric view across the entire business.

See why over 14,000 organizations worldwide use award-winning Sage CRM to make every business interaction count.

Visit na.sage.com/sage-crm or contact us at 1-866-530-7243.

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