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Enhancing  
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productivity.  
.....  
enabling  
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Success.  
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# Sage CRM

## Customer Relationship Management

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Customer Relationship Management (CRM) is far more than just a software application. It is a business solution that gives you the ability to connect with and understand real people covering every interaction with valuable customers across your entire business.

Sage CRM enhances your customers' experience by doing so many things they never even see, for instance, enabling improved business processes, closer management of new and existing customer relationships, increased revenues and decreased inefficiencies. Sage CRM provides management with timely and reliable insight to guide important business decisions.

As the leading supplier of business management solutions to small and medium-sized businesses, Sage has over six million customers worldwide.

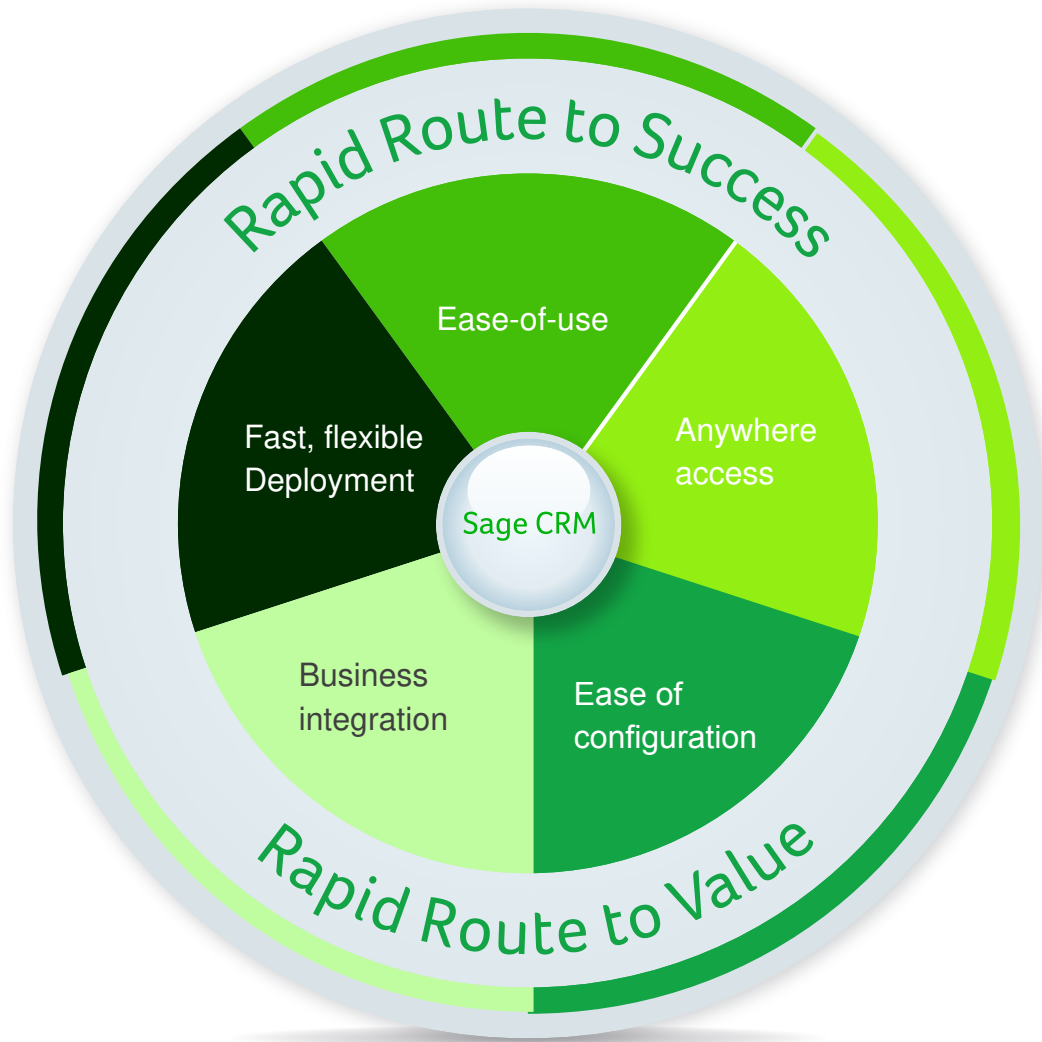
More than 15,000 organizations in 70 countries use our award-winning Sage CRM software to manage their critical sales, marketing and customer service activities every day.

With a choice of editions, and deployment options, Sage CRM has a solution that can meet the individual needs of your business and accelerate your business growth.

# Sage CRM

## Rapid route to success and value

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- Easy-to-use with simple navigation
- Access anywhere, anytime with rich CRM functionality across multiple mobile platforms
- Highly customizable and scalable solution that grows as your needs develop
- Available on-premise or in the cloud
- Integrates with Sage 100 ERP and Sage 300 ERP solutions for a complete view of your customers
- Rapid return on investment and low total cost of ownership

# Sage CRM

## Summary of benefits

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- Ensures your sales, marketing and customer service resources are being used to maximum effect
- Reduces your cost-of-sale
- Reduces the cost of your marketing leads
- Ensures you meet customer service level agreements
- Minimizes administration costs
- Protects and grows your revenue
- Ensures that your investments are all aligned to revenue development
- Enables you to pinpoint underlying issues and take corrective action accordingly
- Reduces the potential for customer attrition
- Enables you to leverage further revenue opportunities within your current customer base
- Empowers your staff to provide exceptional service to your customers
- Reduces your opportunity cost
- Boosts productivity and enables staff to accomplish more in their working day
- Maximizes customer communications and interactions through integrated social media channels

Reduces costs, increases productivity while increasing customer satisfaction

# Sage CRM

## Features at-a-glance

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### For all users

- Easy to use interface with a fresh look and feel
- Fully customizable interactive dashboard
- End-user personalization of interface design and content
- In-built user tutorials, user guide, quick tips and product videos
- Relationship management graphs
- Impactful visual charts and highly graphical reports
- Real-time synchronization between Sage CRM and MS Exchange for seamless calendar management
- Dynamic linking of multiple information sources on a single dashboard screen
- Centralized meeting management
- Full calendar response management
- Fully customizable graphical workflow
- Access Sage CRM across all current internet browsers with cross-browser compatibility

- Mobile CRM access on the latest smartphone and tablet devices
- Internal business collaboration by Yammer: a tool that strengthens collaboration across teams

### For IT professionals

- Out-of-the-box configuration with powerful workflow tools
- Easy to integrate. Quick to deploy and adopt
- Advanced customization capabilities for unique business needs
- Single point of entry for Microsoft Exchange integration, for ease-of-administration and rapid user setup

### Integration capabilities

- Sage ERP integration
- MS Exchange integration
- MS Outlook integration
- Social media integration
- Web self-service portal

# Sage CRM

## Empowers sales teams to sell effectively

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Sage CRM directs your sales efforts towards the most profitable, most winnable deals, and helps you make the most of cross-selling and up-selling 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.

With Sage CRM, the sales team can manage and action all their activities from the interactive dashboard. This intuitive and interactive workspace enables the sales team to monitor their opportunities and pipeline, manage their calendar and tasks, and identify powerful networking opportunities from LinkedIn®, all from this customizable workspace.

Easy-to-use analytical tools help your sales team to identify latent sales opportunities which exist within your customer database, and then create cross-sell and up-sell propositions accordingly. Automated workflow and pipeline management eliminate unnecessary paperwork and ensure that sales teams are optimizing their sales processes and adhering to company-specific sales stages. This means that opportunities will be progressed as quickly and efficiently as possible.

“In the sales department, Sage CRM is the tool that we use all day long. It is vital in fact, because we log all our customer contact in Sage CRM and all our opportunities are tracked in Sage CRM. We would actually lose sight of our opportunities if we didn't have a system like Sage CRM.”

Aine  
O'Mahony,  
Business  
Development  
Team Leader,  
CarTrawler

# Sage CRM

## Empower sales teams

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### Benefits of Sage CRM in sales

Maximize the value of 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
- Enables quarterly sales performance monitoring, improving consistency across the sales organization
- Maximizes cross and up-sell opportunities
- Great user experience on any browser with cross-browser compatibility
- Leverages financial information from the back-office system
- Reduces 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

Sage CRM provides the sales team with the ability to work from a mobile device regardless of where they are located. This ensures that they have fast, up-to-date access to critical customer data especially for those that are often out on the road.

Sage CRM enables mobile sales teams access their important customer information from the latest mobile devices. Additionally, Sage CRM's 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 coverage.

# Sage CRM

## Execute effective marketing campaigns easily

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An invaluable tool for marketers, Sage CRM helps you to plan, execute, and measure the success of every marketing campaign. It becomes much easier to get the right messages to the right people at the right time, eliminating guesswork, and making the best use of your marketing resources. Marketing campaign workflows can be easily customized so they are structured for consistent execution, and for maximum reach and impact. Users can clone campaigns, allowing them to create new campaigns quickly and easily.

Sage E-marketing for Sage CRM\* is a fully integrated email marketing solution which includes attention-grabbing e-marketing templates, smart-sending features, automated drip marketing campaigns and the ability to track open, click and bounce rates from within Sage CRM.

Marketing analytics and reporting enable absolute accountability at all stages in the cycle, which means that return on investment can be calculated with ease and the marketing budget is optimized at all times. This information can be displayed on the interactive dashboard for ease of reference.

\* Sage E-marketing for Sage CRM requires an additional subscription

[sagecrm.com/trial](https://sagecrm.com/trial)



# Sage CRM

## Empower marketing teams

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### Benefits of Sage CRM in marketing

- Create, track and manage dynamic marketing campaigns that really deliver
  - Plan and track activities, tasks, budgets and details for each marketing activity
  - Produce highly targeted customer communications with improved response rates
  - Real-time marketing performance analysis and pinpoint budget management
  - Fully customizable marketing workflow out-of-the-box for rapid campaign execution
  - Includes Sage E-marketing for Sage CRM\* with pre-designed email templates that cover all communication needs
- Tracks all e-marketing email interactions including open, click and bounce rates automatically through Sage CRM
  - Maximizes customer communications and interactions through integrated social media channels
  - Great user experience on any browser with cross-browser compatibility
  - Social CRM solutions for LinkedIn®, Facebook and Twitter extends conversations and collaboration with prospects and customers to social media channels

**Tom Matheny**  
Database Marketing  
Manager  
Buffalo Sabres

“Sage CRM adds a new level of professionalism to our direct mail, telemarketing and email campaigns. The detailed reports we generate give us immediate results, so we can tweak a campaign for greater effectiveness. Our campaigns are at least 20 percent more successful due to Sage CRM.”

# Sage CRM

## Ensure customer satisfaction & loyalty

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Keeping customers loyal and providing them with a satisfying and consistent customer experience can be hard to perfect. Sage CRM enables your company to roll out web-based customer self-service quickly and cost effectively. From here, users can service their own information needs, track data and update the system without the requirement for customer service assistance and at the time and place of their choice.

Additionally, you can maximize the synchronization between your service agents and your customers, ensuring that cases are progressed in a timely manner and in accordance with service level agreements (SLA). All cases can be managed directly from the interactive dashboard removing the need to switch between screens, maximizing the productivity of agents. Knowledge management capabilities make it easier to capture remedies related to specific issues which may recur over time, making sure that agents are not duplicating effort.

### Benefits of Sage CRM in customer service

- Manage your customer accounts with insight and collaboration
- Respond to customer cases quickly, reducing response times to customer service requests
- Enable agents to quickly and accurately find the right answer the first time
- Enables customer satisfaction measurement and benchmarking
- Increases productivity of customer support representatives
- Provides self-service facility to customers around common issues
- Enables customer issues to be tracked and responded to, regardless of who answers the phone or receives the email

# Sage CRM

## Sage CRM mobile solutions

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Mobile CRM is rapidly becoming a must-have for field sales and customer service teams, enabling them to access critical customer information in real-time, increasing sales and service effectiveness at every stage of the customer relationship cycle.

With this in mind Sage CRM has developed a complete mobile solution that equips your mobile workforce with the necessary tools to enable them to do their job effectively.

Sage CRM mobile solutions are an important asset to your sales team enabling users to quickly search and update contacts, opportunities, leads and cases and to run and view reports on the move.



Watch this short video and discover the latest trends in mobile technology and see how Sage CRM mobile solutions can benefit your business.

[bit.ly/sagecrmismobile](http://bit.ly/sagecrmismobile)

[sagecrm.com/trial](http://sagecrm.com/trial)

# Sage CRM

## Sage E-Marketing for Sage CRM

Sage E-marketing for Sage CRM\* is a fully integrated email marketing solution which includes attention-grabbing e-marketing templates, smart-sending features, automated drip marketing campaigns and the ability to track open, click and bounce rates all from within Sage CRM.

Sage E-marketing for Sage CRM delivers all the power of e-marketing software directly through Sage CRM for end-to-end marketing campaign management. With a library of over 90 highly designed templates, users can execute targeted email marketing campaigns and drip marketing campaigns to the right people at the right time for maximum impact.

Responses can be analyzed in real-time and campaigns can be tweaked continuously to ensure that companies get the maximum return on investment from each and every campaign.

From open rates to click and bounce tracking rate, this easy-to-use feature will not only help quantify the success of an e-marketing campaign but will allow users to pinpoint exactly how they can improve their communications and keep customers and prospects engaged.



Users can benefit from a simple three-step wizard to easily create new e-marketing campaigns with a choice of over 90 templates to get started immediately.

\* Sage E-marketing for Sage CRM requires an additional subscription

[sagecrm.com/trial](http://sagecrm.com/trial)

# Cloud or On-Premise: It's Your Choice

## Cloud



Managed by us



Deployed in Cloud



Upgrade automatically

### Sage CRM Professional (Cloud)

Fully cloud-based, Sage CRM Professional (Cloud) delivers contact management and helps you manage your sales function, for a low and predictable monthly cost.

Start your FREE trial now



Ease of use



Fast, flexible deployment



Anytime, anywhere access



Easy customisation



Sage and 3rd party products integration



Rapid Return on Investment



Low Total Cost of Ownership



Ideal for small and medium business



Highly secure

## On-Premise



Managed by you



Deployed in your offices



Upgrade when you want

### Sage CRM (On-Premise)

A fully featured solution, Sage CRM (On-Premise) automates marketing, sales and customer service operations and can be easily customised to meet your unique business requirements.

Schedule a demo now

# About Sage CRM

Sage CRM is used by over 15,000 organizations in 70 countries worldwide to manage their critical sales, marketing and customer service activities every day. Award-winning Sage CRM equips businesses 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. When connecting Sage ERP with Sage CRM, businesses benefit from more insights, increased efficiencies and productivity, and gain a single, customer-centric view across their entire business.

See for yourself the difference that Sage CRM could make to your business. Let us help you determine which Sage CRM solution best fits your business needs.

Visit [na.sage.com/us/sage-crm](http://na.sage.com/us/sage-crm) to find out more. Call us at 1-866-530-7243, or contact your Sage business partner.

Get social with Sage CRM  
and stay up to date

