



Sage CRM and SageCRM.com

Overview Presentation



What is Sage CRM

Wikipedia Defines CRM as:

Customer relationship management (CRM) is a widely implemented strategy for managing a company's interactions with customers, clients, and sales prospects. It involves using technology to organize, automate, and synchronize business processes—principally sales activities, but also those for marketing, customer service, and technical support.

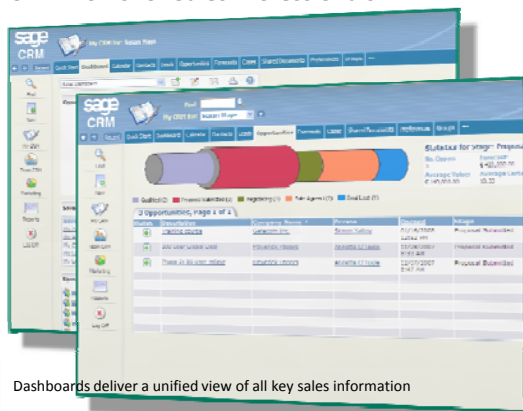
The overall goals are to find, attract, and win new clients; nurture and retain those the company already has; entice former clients back into the fold; and reduce the costs of marketing and client service.

Sage CRM

Overview

Sage CRM works for Sales Professionals

- Empowers them to sell more effectively
- Enables them to focus on the most important sales opportunities
- Helps them to reduce the amount of time spent on sales administration



Dashboards deliver a unified view of all key sales information

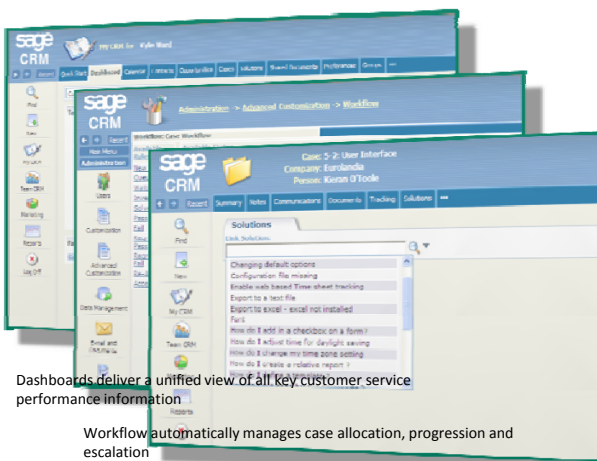
Real-time pipeline management ensures focussed sales activity

Sage CRM

Overview

Sage CRM works for Customer Service Professionals

- Enables them to monitor customer service performance in real time
- Helps them to reduce the amount of time spent on customer service administration
- Enables them to leverage the knowledge of their colleagues



Dashboards deliver a unified view of all key customer service performance information

Workflow automatically manages case allocation, progression and escalation

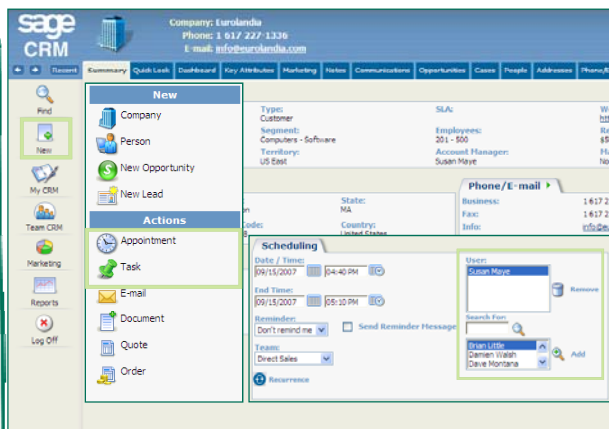
Knowledgebase provides central repository for solutions that address common issues

Sage CRM

Overview

Sage CRM provides for full activity management

- Sage CRM provides a complete calendar and task management solution
- View by day, week, month and due-by dates
- Right-click on the "New" icon in any record to setup a linked appointment or task
- Schedule multi-user activities

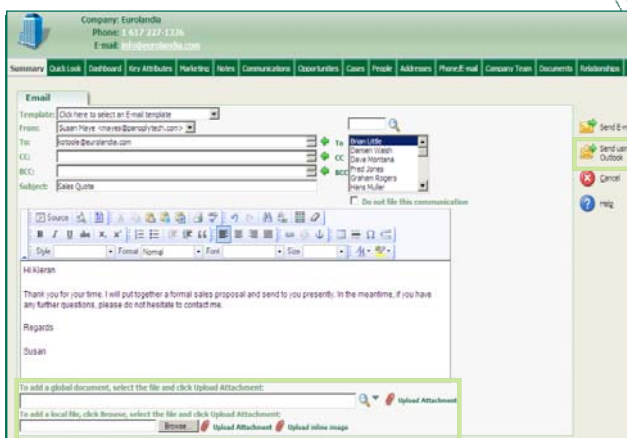


Sage CRM

Overview

Sage CRM works seamlessly with Outlook E-mail

- E-mails sent from Outlook can be filed against records contained within Sage CRM with one click
- E-mails can be sent using Outlook from within Sage CRM using the "Send Outlook E-mail" function
- Sage CRM stores and tracks attachments for both Outlook and Sage CRM e-mails



Sage CRM

Overview

The interactive dashboards boosts productivity in your business

- The Sage CRM Interactive Dashboard will revolutionise how you manage your business and your employees manage their day
- Users can manage and control activities and tasks from one workspace display feeds from within Sage CRM, from external websites and from integrated Sage ERP applications
- Provides a single view of relevant information empowering businesses to make informed decisions



Sage CRM

Overview

Sage CRM provides for offline access and mobile access

- Sage CRM enables users to define and download a subset of their customer data onto their laptop which can then be used on-the-road; even in the absence of an internet connection
- Sage CRM can also be deployed over a variety of mobile devices providing field-based users with core Sage CRM functionality



Calendar view



Pipeline view



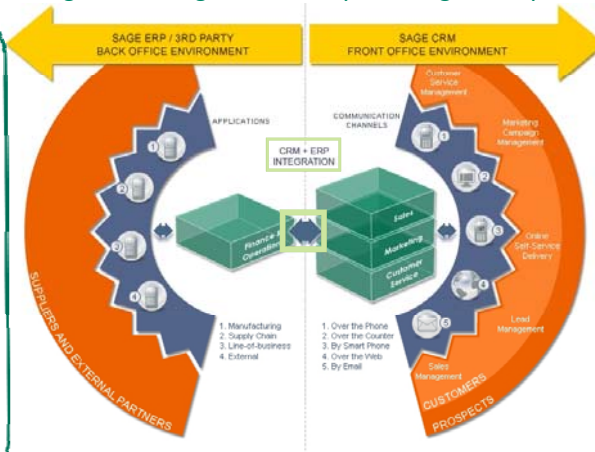
Opportunity view

Sage CRM

Overview

- Sage provides out-of-the-box, front-to-back office integration with leading Sage ERP systems
- This provides for:
 - Consistent customer data across front and back-office environments
 - CRM user visibility into the ERP system
 - "Straight-through" processes which reduce the need to re-key and re-check information during the process

Sage CRM integrates natively with Sage ERP systems

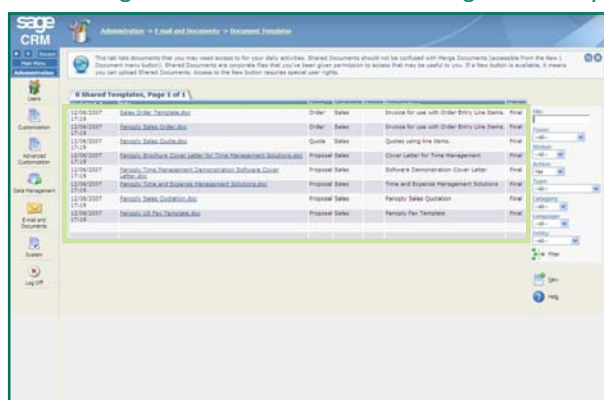


Sage CRM

Sales Force Automation

- The Sage CRM "Document Drop" facility makes it easy for sales staff to drag and drop important documents, presentations, spreadsheets and other files, and attach them to individual companies and opportunities
- Document templates can be stored centrally and mail merges can be carried out instantly against individual contacts or groups

Sage CRM makes document management easy



Sage CRM

Sales Force Automation

Sage CRM provides for powerful sales reporting

- Sage CRM provides a comprehensive suite of standard sales reports straight out of the box
- Existing reports can be fully customised and new reports can be created from scratch using Sage CRM's wizard-based report customisation tools

Reports
Access to the Reports home page. Simply select a Report category and run the report you require. If you are an information manager you can also create new reports or edit existing ones from within the category you select.

My Favorite Reports
 This report area allows you quick access to the reports and charts you use on a regular basis. You decide which reports you want to be available from this report area.

Campaigns
 A set of pre-defined reports and charts that track your marketing campaigns.

Customer Care
 A set of pre-defined reports and charts for keeping track of all customer care issues in the system.

Lead Reports
 A set of pre-defined reports and charts for evaluating and tracking leads in the system.

Sales
 A set of pre-defined reports and charts to help you better manage the entire sales cycle.

Report Name	Report Details	Print	Full	Print
Account Manager Dashboard				
Account Summary				
My Open Opportunities				
Opportunities By Forecast				
Opportunities by Sales Rep Group				
Opportunities by Territory				
Opportunities Closing				
Opportunities Closing this Quarter				
Opportunities Closing History				
Opportunities Status By Rep				
Working Activities by Dept. Department				
Team Opportunities				

Report Details

Name: Resource Owner:

Report Type: Report Style:

Category:

Private Report
 Auto Refreshing
 Show original currency values
 Select distinct values

Filter by Current User
 Filter by User's Primary Team
 Filter by User's Home Territory

Sage CRM



Benefits review

- *Quality, consistency, and efficiency
- *Decrease in overall costs
- *Centralize your contacts
- *Decision Support
- *Customer follow up management
- *Improved planning



More info, see me at the break

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