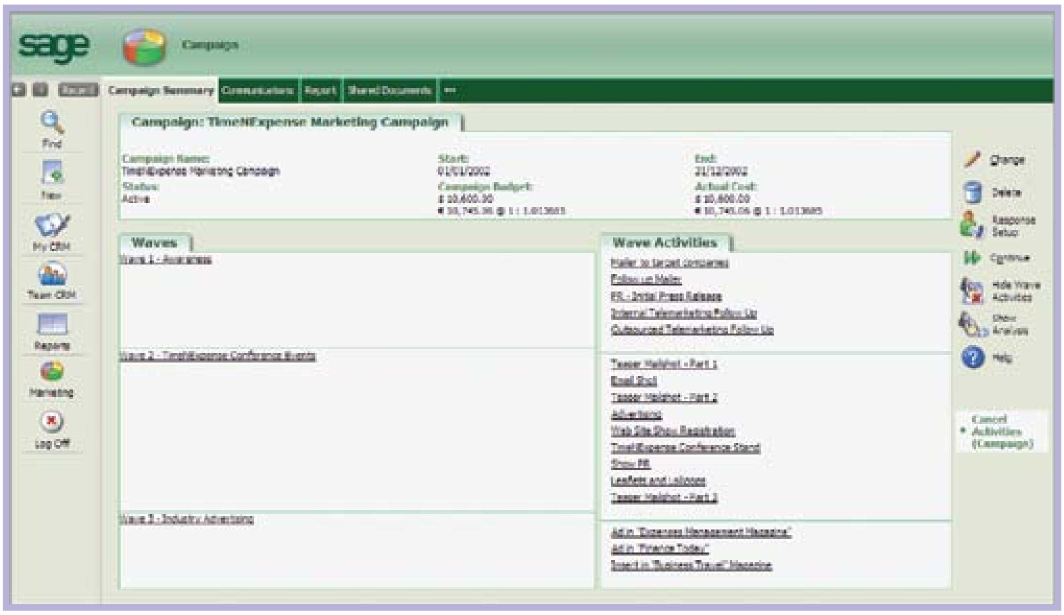
Sage CRM version 6.2

Sales Force Automation

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. 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 accounting and 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.



Feature	Explanation	Benefits
Sage CRM enhancements\new features:		
Calendar 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.	Increases efficiency, punctuality and convenience.
Complete Bi-directional Outlook Integration	It is possible to run email, 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.	Fosters organisational transparency within the business and enhances the quality and retention of information available to the user.
Management of Key Opportunities and Leads	Using Sage CRM sales users can track leads from first contact to final sales closure.	Ensures that time and resources are invested into the deals that are most likely to close. Enables the sales team to easily identify and recruit new customers and resell or up-sell to existing accounts.
Sales Forecasting and Reporting	Point and Click reporting and graphs are provided by Sage CRM along with accurate and timely forecasts which are accessible by sales representatives and managers alike.	Enables easy sales forecasting and reporting. Gives sales teams and management access to data for immediate analysis and decision-making. Delivers on-demand reports for business insight.
Account and Activity Management	With Sage CRM leads can be escalated and reassigned easily, follow-up activities can be automated and field-level security is a simple and straight-forward process.	Guarantees that leads are handled by the employees most qualified to assist the client and only relevant parties are privy to information.

Client Awareness	The most up-to-date and complete customer information is instantly and easily retrievable within Sage CRM.	Helps organisations to have a better view of their customer and deliver superior customer service.
Graphical Reporting	Graphical forecasting and reporting features allow filtering of data per the user's criteria. It is also possible to use system default reports or easily create new reports with the aid of a reporting wizard.	Provides detailed data as required by businesses as well as graphical interpretations on the state of the business at any moment in time. Allows businesses to strategically plan and gain insights on future performance.
Quotes and Order Generation	Sales users have the functionality to automatically generate sales proposals using predefined templates. The most up to date quotes are delivered with access to the latest product information.	Maximises efficiency, reduces the margin for error and professionalises communications.
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.	Delivers insight into sales effectiveness and performance by territory.
Escalation and Notification Alerts	Sage CRM delivers periodic messages to sales managers summarising critical opportunity and forecast information for their direct reports.	Ensures business opportunities are always retained and worked on.
Sales Process Automation	Vital customer and prospect information can be retrieved quickly and easily, time is organised and administrative tasks are reduced to a minimum.	Automates the sales process to enable users to concentrate on their primary purpose which is selling.
Workflow	The in-built workflow can be followed out-of-the box or customised to reflect your business process.	Automates the sales process so 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.
Pipeline Management	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 professionals are provided with tools to increase productivity and efficiency. Pipeline management is easier to do and at-a-glance status is available.
Document Sharing	Literature fulfilment can be automated and simplified.	Decreases administrative and other non-revenue generating activities which all impact on business performance and personal productivity.
My CRM and Team CRM	Individual and team views of activities are available.	Gives both individuals and management a single view of business activities as and when required.
Anytime Anywhere workforce	Sage CRM provides the sales team with the ability to work offline or mobile wherever they are around the world.	Sage CRM provides the system administrator with the ability to create profiles for offline users which optimises the download and synchronisation of data. This ensures that the sales person downloads data that is only relevant to them.
ERP Integration	Sales staff have access ERP-powered functionality such as accurate pricing for quotes and orders, fulfilment data, and complex pricing rules and discounts normally held in the back office system only. Financial and non-financial information is accessible in the one place for a 360 degree view of the customer.	Allows sales teams to effectively manage, forecast and report on all phases of the sales cycle; gives sales staff a true 360 degree view of the customer across front and back office systems for better account management.

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.

Sage CRM for the Sales Manager/Director

The Sales Manager/Director's primary responsibilities are: delivering the expected levels of revenue performance, managing sales performance, executing against corporate strategy and developing long-term, profitable relationships with customers. Sage CRM enables the Sales Manager/Director to deliver against these objectives.

Benefits of Sage CRM to the Sales Manager/Director:

- Improves transparency in the sales pipeline
- Offers exception monitoring/alerts
- Enables corrective action against variance earlier in the sales cycle
- Enhances sales forecast accuracy
- Monitors progress against quota
- Enables quarterly sales performance monitoring
- Optimises sales resource against high potential opportunities
- Accelerates opportunity development
- Leads to improved win/loss ratio
- Leads to shortened sales cycles
- Increases prospect-to-customer conversion rate
- Delivers metrics on most valuable customers
- Reporting and analytics features to identify customer trends and profiles
- Improves consistency across the sales organization
- Enables more effective identification of new market opportunities
- Maximises cross and up-sell opportunities
- Reduces sales training costs
- Reduces sales administration
- Eliminates manual/duplicated sales processes
- Improves team collaboration on opportunities
- Decreases time spent on administrative tasks
- Improves prospect targeting
- Increases revenue yield per opportunity and account
- Leverages intelligence from back-office applications
- Provides visibility on sales team performance including identifying sales opportunities and pipeline potential

Here is a round-up of questions which Sales Managers have commonly raised in our consultations:

***Question:* How can I assess the performance of my sales team?**

Answer: Sage CRM enables easy sales forecasting and reporting. It 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 Dashboards present key performance data in a highly 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.

***Question:* How can I provide my team with access to real-time customer data when they are out on the road selling and meeting customers?**

Answer: Field-based teams and remote-office employees can access Sage CRM through a standard Internet browser providing ultimate business agility and productivity, as well as minimum IT overhead. Remote laptop users can work offline and synchronise at a later point in time, ensuring that they can continue to use their Sage CRM system regardless of location or access scenario. Administrators can create download settings for each individual depending on their access requirements which will optimise data synchronisation and overall database performance. For mobile solutions, Sage CRM supports online access to the system from any Windows Mobile device via the browser on the device, and also offers Blackberry access via the Blackberry Pearl 8100 range, enabling users to access critical customer data while on the move.

***Question:* How can I ensure that quotes and proposals are standardised across the sales team?**

Answer: Sales users can automatically generate sales proposals and quotes using predefined templates. Centrally managed quotation templates, along with up-to-date product information ensure that quotes and proposals are standardised across the entire sales team and are based on the most accurate pricing information available at that point in time. This not only maximises efficiency but reduces the margin for error and makes communication more professional.

***Question:* How can I ensure that each member of the sales department manages their opportunities effectively and maximises their conversion rate on an on-going basis?**

Answer: Sage CRM enables senior sales executives to track leads from first contact to final sales closure. The product's in-built workflow ensures that the entire sales process is managed effectively and 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.

***Question:* How can I ensure that leads that are generated are assigned to the correct sales territory?**

Answer: With Sage CRM, assignment rules automatically route leads to the relevant sales person based on territories. Territories can be used to: create new teams, reassign ownership of teams and view marketing campaign response rates along with associated sales revenue by territory.

Sage CRM for the Sales Executive

Benefits of Sage CRM to the Sales Executive:

- Increases visibility on customer interaction across departments and activities
- Automates proposal and quotation processes
- Eliminates manual/duplicated sales processes
- Enables more effective collaboration with other sales executives and sales management
- Optimises focus on high-potential opportunities
- Leverages financial information from the back-office system
- Leverages market and competitive intelligence to improve win rates
- Reduces time spent in the office (more time on sales calls) on sales administration
- Enables data entry to be done once only
- Reduces the amount of time spent forecasting
- Assists to better organise and co-ordinate meetings and tasks
- Ability to access and download customer information remotely or offline increasing sales effectiveness

Here is a round-up of questions which Sales Executives have commonly raised in our consultations:

***Question:* Before I call/e-mail/visit my customers, I need to know everything about them and their interactions but this takes too long to collate with other departments?**

Answer: Sage CRM provides the sales executives with 360 degree view of the customer across all departments and interaction types, and provides instant access to: notes, cases, communication history, marketing campaign information and opportunities. This enables sales executives to service their customers more effectively and address issues at the earliest possible opportunity.

***Question:* How can I effectively keep track of client visits, pipeline meetings and routine tasks?**

Answer: Sage CRM calendar management provides sales executives with a complete diary solution encompassing daily, weekly, monthly and yearly views; delivering greater efficiency and convenience on an on-going basis. Sage CRM also offers powerful integration with Microsoft Outlook enabling bi-directional synchronisation of appointments, tasks and contacts. This ensures that each users' calendar is up-to-date at all times.

Question: ***Effectively meeting my targets means that I have to keep a close eye on my pipeline updating it as it changes which can be quite a manual and tedious task?***

Answer: The Opportunities tab on Sage CRM provides a graphical representation of all the leads that have been assigned to individual sales representatives. Users can quickly prioritise opportunities by stage and close probability; ensuring that they can focus their time and resources into the deals that are most likely to close. Creating new opportunities against existing or new customers is also an easy task. Sales executives also have access to a suite of standardised reports which can be generated to identify opportunities by status (in progress/won/lost), by stage (demo/ lead/qualified/proposal/negotiating/closed) or by value.

Question: ***Managing customer accounts efficiently is difficult when relying on other departments for key information.***

Answer: 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. For example, sales staff can also 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.

Question: ***I spend a lot of my time communicating with clients. I need to ensure that I use the time wisely.***

Answer: 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.

Question: ***I spend a lot of time on the road, I need to ensure that I can access and record customer information.***

Answer: Sage CRM supports online access to the system from any Windows Mobile device or through selected Blackberry devices, enabling users to access critical real-time customer data while on the move. Screens can be customised by the system administrator using the regular Sage CRM screen configuration area. Sage CRM also enables laptop users on the move to work offline and later synchronise with the central server using the Sage CRM Solo offline client. Synchronisation feature “Solo”. Users have access to important account contact and history information, activities and appointments via the same interface as when online. Administrators can also create user profiles for each Sales person. This helps to ensure that users only synchronise data relevant to them and that optimal synchronisation performance and stability is maintained with the Solo client.

Sage (UK) Limited,
North Park,
Newcastle upon Tyne,
NE13 9AA

Tel 0845 111 9988
Fax 0845 245 0297
www.sage.co.uk