sage

Enhancing
Productivity.
Enabling
Success.

Sage CRM

Sage CRM
Rapid Route to Success & Value

- 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 key Sage ERP solutions for a complete view of your customers

- Rapid return on investment and low total cost of ownership

Sage CRM
Customer Relationship Management

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 12,000 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

Sage CRM
Benefits Snapshot

- 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

For all users

- Easy to use interface with a fresh look and feel

- Fully customizable interactive dashboard

- End-user personalisation 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 modern internet browsers with cross-browser compatability

- Mobile CRM access on the latest smartphone and tablet devices

- Business Collaboration powered by Yammer, a powerful tool that enables greater collaboration across teams

For IT Professionals

- Out-of-the-box customization

- Easy to install and quick to deploy

- Easy to integrate

- Flexible deployment options

- Advanced customization capabilities

- Single point of entry for Sage CRM and MS Exchange integration for ease-of-administration and rapid new user setup

Integration Capabilities

- Sage ERP integration

- MS Exchange integration

- MS Outlook integration

- Social media integration

- Web self-service

Sage CRM

Sage CRM
Empowers Sales Teams to Sell Effectively

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 optimising 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."

M.M.C. Kishore, Owner, Global Marketing Services

Sage CRM
Empower Sales Teams

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Benefits of Sage CRM to the Sales Team

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 organisation

- 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.
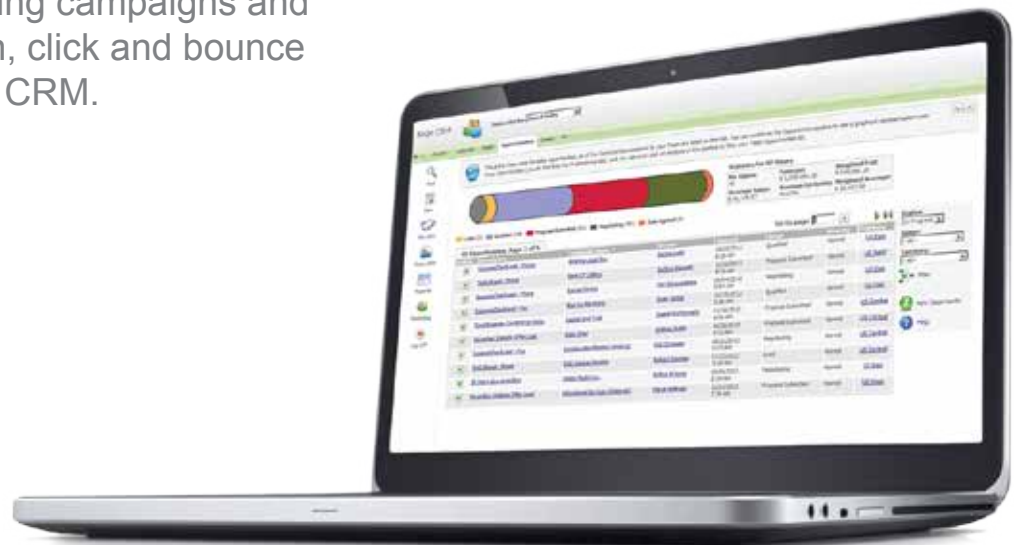

Sage CRM

Sage CRM
Execute Effective Marketing Campaigns Quickly and Easily

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 and share 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 ensure 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

Sage CRM
Empower Marketing Teams

Benefits of Sage CRM to the Marketing Team

- 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

Kumaraswamy H R,
CFO,
Juki Machines India
Pvt Ltd

"Sage CRM
fulfilled our initial need
of maintaining customers in
centralized database and made
sure it remains available enterprise
wide for proactive sales, good
service which leads to customer
satisfaction and helps
building Long Term
Relationships."

Sage CRM

Sage CRM
Ensure Customer Satisfaction & Loyalty

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 to the Customer Services Team

- 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
Interactive Dashboard & Cross-Browser Compatibility

Interactive Dashboard

The Sage CRM interactive dashboard revolutionizes the way you manage your business and how your employees manage their day. The interactive dashboard delivers a rich and personalized user experience that boosts productivity and helps drive user adoption across the business.

With the Sage CRM interactive dashboard, users can manage all their activity from one place. This includes their calendar, their tasks, their lists and web and RSS feeds, driving productivity throughout your organisation and enabling your staff to accomplish more from a tailored workspace that combines the information they use every day.

Using innovative drag and drop functionality, users can re-size and re-position gadgets, enabling them to personalize the data they see and how it is presented to them. This delivers an intuitive and convenient way to view and action items, reducing the need to switch between screens. A number of pre-installed role-based dashboards are available out-of-the-box for sales, marketing, customer service and management. Users can also create bespoke company dashboards for key accounts ensuring that relevant content is available for maximum efficiency.

Cross-browser Compatibility

Sage CRM provides end users with the ability to access their solution across all modern internet browsers and work efficiently through the modern, intuitive interface. Supported browsers include Internet Explorer (versions 7, 8 and 9) and the latest versions of Firefox, Chrome and Safari.

Access your personalized interactive dashboard from the browser of your choice with cross-browser compatability.
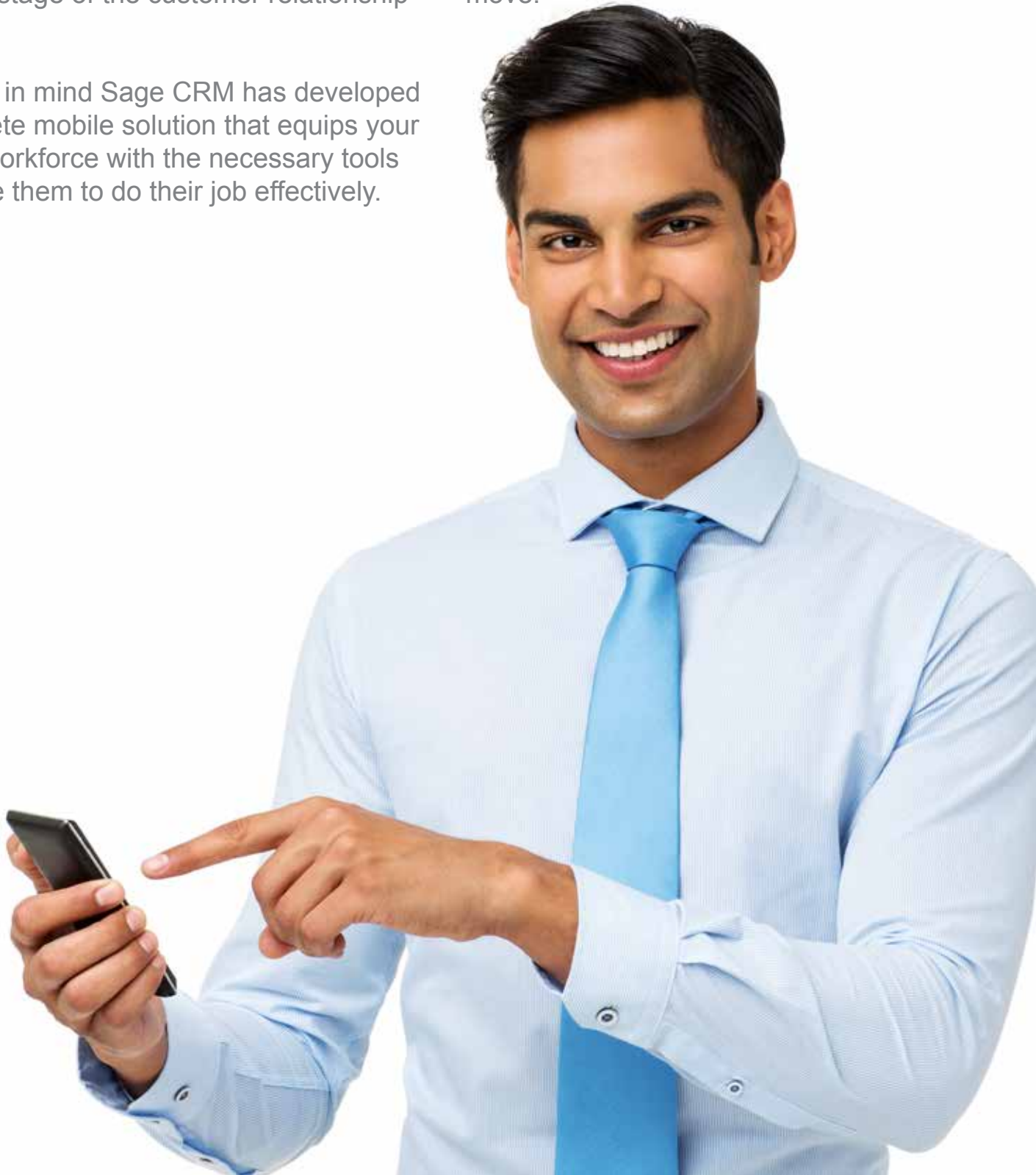
Sage CRM

Sage CRM
Sage CRM Mobile Solutions

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.

Sage CRM
Sage CRM Social CRM Solutions

Sage CRM integrates with key social media applications such as Twitter, LinkedIn® & Facebook providing new ways to connect and interact with customers and prospects.

Social CRM provides new ways for businesses to interact with and get closer to customers. Integrating social media activity with CRM can further harness the power of communication with your customers and prospects, creating a meaningful community and building strong mutually-rewarding relationships.

Sage CRM integrates with key social media applications such as LinkedIn®, Facebook and Twitter to enable users to engage with prospects and customers in a collaborative manner. This enables teams to generate leads, foster loyalty, build customer retention and increase revenue.

Key integrations with LinkedIn®, Twitter and Facebook enable your marketing teams to extend conversations and collaboration with prospects and customers to social media channels. By engaging with LinkedIn® members through Sage CRM for LinkedIn®, users can tap into the endless possibilities of social networking for instant knowledge about customers and prospects. Sage CRM for Twitter enables companies to manage their communications with prospects and customers directly from within Sage CRM. Sage CRM for Twitter enables users to post or reply directly to a tweet from within Sage CRM. Not only this but users can view Twitter feeds for specific companies and people and can then save the contents of the Tweet to a note within Sage CRM.

Sage CRM for Facebook enables users to gain customer insights from Facebook, giving them a a complete picture of customer and prospect interactions, without leaving Sage CRM. In addition to these key social CRM integrations, a website gadget on the Sage CRM interactive dashboard allows users to browse social media sites from within Sage CRM, removing the need for them to switch between applications.

Sage CRM

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

Sage CRM
Make Informed Business Decisions

Having a detailed knowledge of your business performance and a deep understanding of your customers is critical for senior management. Sage CRM provides extensive central control over operations and budgets, helping senior management to control these areas more effectively.

Highly visual reports and graphical charts which are displayed for ease-of-reference on the interactive dashboard provide at-a-glance insight into business and employee performance across multiple criteria, facilitating informed business decisions.

With Sage CRM, senior managers have the ability to validate forecast data with full drill-down to the underlying opportunities.

Real-time visibility on revenue and budget variance ensures that decisions are based on accurate information, and corrective action can be taken earlier in the cycle when it has maximum impact.

"We believe that we're now one of the leaders in the industry in providing critical information to clients, instantly accessible whenever they want it. This helps us to win new business and enhance our service to existing clients."

Simon Adcock, Managing Director, ATEC Security Limited

Sage CRM

Sage CRM

Accelerating your business success

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