

SageCRM

Driving your business forward
in demanding times



Accelerate Your Performance with True 360° Business Visibility

Imagine: Your top sales professional calls your best customer to sell him a new product. What he doesn't know is that the customer initiated a customer service ticket last week and did not pay last month's bill. Needless to say, the call goes badly.

Same customer, different scenario: This time, your sales professional and your customer service rep know everything there is to know about the customer and the health of the account. They know how much he's bought over the years, how timely his payments are, and how seldom he raises issues. So they work together to satisfactorily resolve his concerns and boost his confidence in your company. And, as a result, he pays his bill and agrees to consider purchasing the new product.

Does the second scenario sound improbable? Not so. This is just one example of the power and effectiveness of SageCRM.

It takes more than great products to drive sales. Acquiring and retaining customers is essential for business success, and great customer service is the driving force that differentiates one business from another. Customer Relationship Management (CRM) helps businesses attract and retain customers, and deliver an exceptional customer experience every time. With SageCRM, you can unlock the full revenue potential of your current customers and unearth sales opportunities with prospects.

SageCRM connects your sales, marketing, and customer service teams, and more. It delivers tight integration with leading Sage ERP solutions, breaking down departmental silos and providing a true 360° view of customers across front- and back-office functions. Highly flexible, SageCRM comes with fully customizable business process automation so you can tailor it to suit your business needs. SageCRM is available on-demand or on-premise for complete freedom of choice.

Benefits to your business:

Empower your staff with enterprise-wide access to vital customer, partner, and prospect information

Manage and synchronize sales, marketing, and customer care activities across all points of interaction

Automate key aspects of the sales cycle and analyze, forecast, and report on key sales data

Create, schedule, and track marketing campaign activities, and measure the performance of every campaign

Deliver outstanding customer service, ensuring customer loyalty and repeat sales

Gain valuable insight into customer trends to guide strategic business decisions

Deploy in the way that best fits your organization, increasing user adoption and providing flexibility

Access critical customer data anytime, in the office, on the road, or from your mobile device

Integrate with leading Sage back-office solutions for a 360° customer view

“All of Asbestway's achievements with SageCRM have enabled the company to grow 40-50% in revenues in the last 12-24 months, without dramatically increasing our workforce. We're able to hire less even though we're doing more business because of SageCRM.”

– Manager, Asbestway

Choose on-demand or on-premise

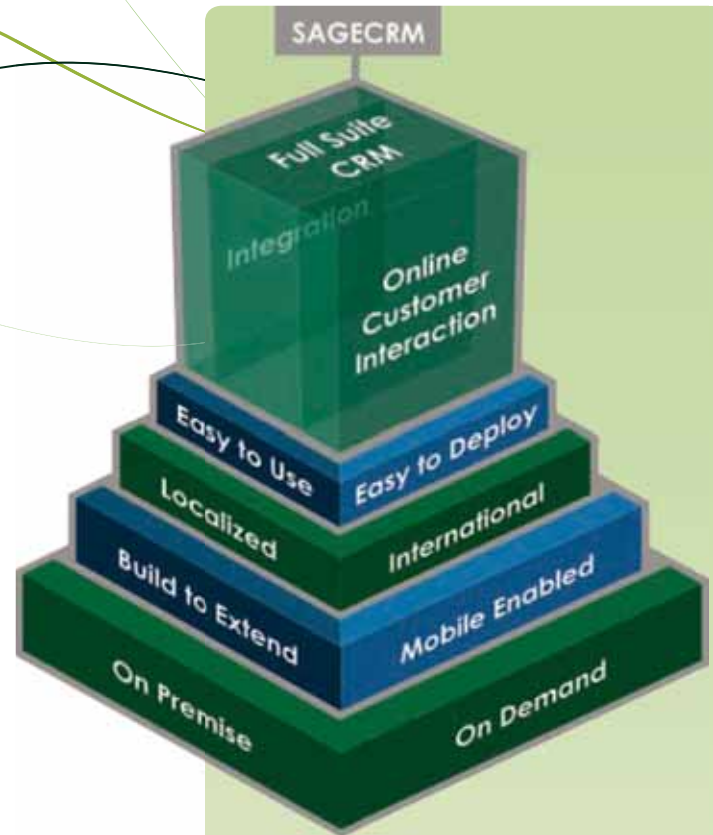
SageCRM is an easy-to-use, fast-to-deploy on-premise CRM software solution with out-of-the-box but configurable business process automation. It provides enterprise-wide access to vital customer information anytime, anywhere so you can better manage your business.

View a SageCRM eDemo at www.sagecrmsolutions.com/demo/sagecrm/liveedemos

SageCRM.com is a comprehensive on-demand CRM solution for businesses seeking a low-cost, low-risk option. A fixed monthly price delivers everything: the CRM application, support, training, backups, and updates.

Try SageCRM.com free for 30 days.

Visit <https://northamerica.sagecrm.com/trial>



Features At-a-Glance

FOR ALL USERS

- Interactive and role-based dashboards
- Advanced customization capabilities
- Built-in user tutorials, user guide, and quick tips
- Flexible deployment options
- Easy-to-use layout
- Ability to personalize interface designs

FOR SALES PROFESSIONALS

- Account, contact, and opportunity management
- Comprehensive reporting and analytical tools
- Sales forecasting and territory alignment
- Process and workflow automation
- Mobile solutions and offline synchronization
- Escalation and auto notifications
- Quote and order entry

FOR IT PROFESSIONALS

- Out-of-the-box customization
- Easy to install and fast to deploy
- Easy to integrate
- Flexible deployment options

FOR MARKETING PROFESSIONALS

- Campaign management and analysis
- Lead qualification and management
- Comprehensive email formatting options
- Mail merge functionality
- Outbound calling
- List management
- Customer segmentation

FOR CUSTOMER SERVICE PROFESSIONALS

- Customer self-service portal
- Case tracking and management
- Workflow automation
- Knowledgebase recording customer service solutions
- Address maintenance and linking tools
- Escalation and auto notifications
- Reporting

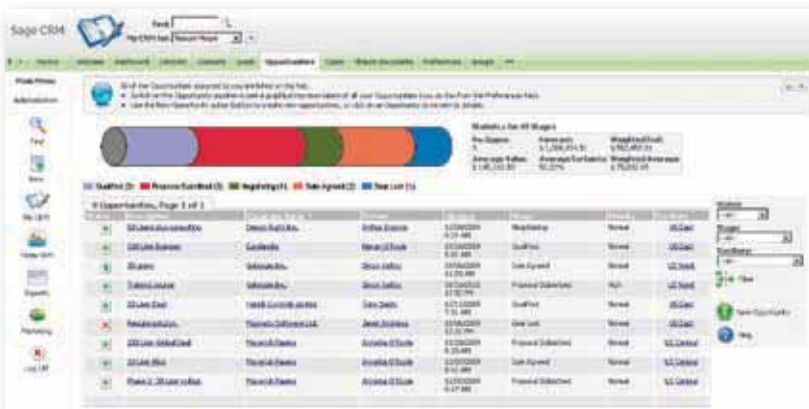
INTEGRATION CAPABILITIES

- Microsoft Outlook Integration
- Integrates out-of-the-box with many leading Sage ERP products
- Computer telephony integration

Drive sales

SageCRM puts you in complete control of your sales pipeline, allowing your sales team to effectively manage, forecast, and report on all phases of the sales cycle. Sales teams gain instant access to vital customer data including reports and graphs, quotes, forecasts, and history. Plus, integration with back-office applications provides sales staff with financial and non-financial data for a complete 360° view of customers.

Sales cycles can be shortened and more deals can close faster. Leads are automatically distributed to sales professionals. Mobile and offline solutions offer sales teams access to the information and services they need to do their jobs effectively, regardless of location. With SageCRM, you can identify your best opportunities, make informed decisions you can trust, and eliminate bottlenecks that typically lengthen the sales cycle.



● Sales teams can track leads from initial contact to closure and ensure that nothing falls between the cracks.

Benefits to Sales:

Improves transparency in the sales pipeline

Offers exception monitoring/alerts

Enhances sales forecast accuracy

Enables quarterly sales performance monitoring

Accelerates opportunity development

Leads to improved win/loss ratio

Identifies customer trends and profiles

Enables more effective identification of new market opportunities

Maximizes cross- and up-sell opportunities

Eliminates manual/duplicated sales processes

Improves team collaboration on opportunities

Decreases time spent on administrative tasks

Improves prospect targeting

Leverages intelligence from back-office applications

“SageCRM supports a culture of constant progress. With SageCRM, the next step is automatically built into the process, so we’re always moving forward together to make the most of sales opportunities and build closer customer relationships. It reinforces the rigorous discipline of how we need leads to be followed up and the business developed.”

– Managing Director, Kayasersberg Plastics

“It’s been smooth sailing. The biggest gain is the ability to share customer and prospect databases with users. We want to better manage leads and accomplish sales growth, which we are seeing as a result of SageCRM.”

– Information Systems Manager, YoCream

Drive marketing

Take control of your marketing dollars by automating and tracking every marketing campaign, from one-time email communications to multi-faceted marketing programs. SageCRM marketing automation provides accurate metrics on all of your marketing activities, enabling you to close more new business and capitalize on lucrative cross-sell and up-sell opportunities.

With SageCRM, you can target the right customer at the right time, eliminate guesswork, improve campaign management, and put your company’s marketing resources to their best use. Execute more effective campaigns, track responses faster and easier than ever before, and make sound decisions based on what your customers want and how they respond.



● Campaigns can be easily managed and tracked.

Benefits to Marketing:

Reduces marketing administrative overhead and enables marketing budget to be tracked and managed

Enables marketing programs to be planned more efficiently and effectively

Improves marketing campaign response rate

Produces highly targeted customer communications

Leads to decreased cost per customer acquired

Reduces marketing campaign lead times

Delivers detailed information on the lifetime value of customers and enables profitable customers to be easily identified

Offers real-time marketing performance analysis

Allows close alignment with the sales department and other key stakeholders

Provides improved intelligence to marketing on lead generation activities

Enables accurate measurement of marketing campaign ROI

Ensures customers receive the right marketing message at the right time

Drive customer satisfaction

With SageCRM, you can make the most of every customer interaction, maximizing business opportunities and customer satisfaction. It empowers your organization with critical information to build and support long-term customer satisfaction and loyalty.

With fast online access to service requests, call and escalation history, interactions, multiple contacts, support cases, email, and documents sent and received, you'll have complete and accurate data at your fingertips. SageCRM customer support automation enables you to quickly resolve issues and easily capitalize on cross-sell or up-sell opportunities.



- The case management function allows companies to ensure that customer issues/queries are being tracked, managed, and followed-up effectively.

Benefits to Customer Service:

Enables customer satisfaction measurement and benchmarking

Increases productivity of customer support representatives

Ensures issues never “get lost between the cracks”

Monitors service performance against service level agreements

Enables customer issues to be tracked and responded to, regardless of who answers the phone or received the email

Improves response times to customer service requests

Reduces hold times for customers requiring customer support

Reduces the average time to resolve an issue

Leads to decreased number of service escalations

Extends customer service through 24/7 self-service options

Enables benchmarking/score carding of customer service operations on an on-going basis

Leads to increased customer retention

“With SageCRM, we now have a system that automates all of the administration in dealing with our customer base. Our operators have a full service and booking history of all the callers, therefore we are building up a much deeper impression of the ‘Avis experience’ that they are having. In addition, call resolution time is down, making it a more satisfying customer experience.”

– Manager, Avis

“We knew that if we could centralize all information, we would increase service levels, optimize sales force efficiency, improve accuracy and inventory control, and streamline just about every other business process.”

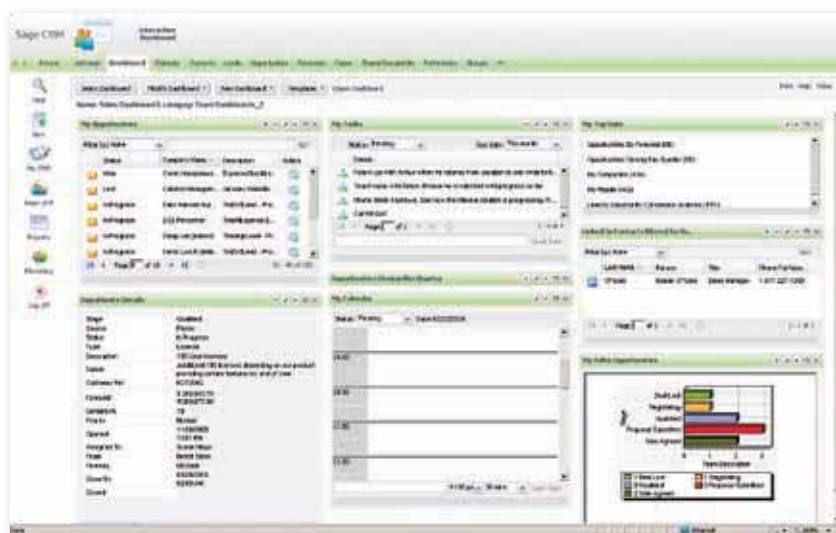
– Director of Information Systems
Source Technologies

Drive user adoption and lower costs

SageCRM offers flexible customization options, automated process workflow, mobile device access, computer telephony integration (CTI), web self-service, and more, so you can improve productivity and differentiate your business from the competition.

With the powerful workflow tools in SageCRM, you can embed and automate your best practices for sales, service, and marketing. Through an intuitive graphical user interface, SageCRM lets you design and modify the stages and steps of your preferred business processes, define the underlying business rules, and automate their execution. You can also implement support escalation processes based on pre-defined service level agreements.

SageCRM includes easy-to-use configuration tools, which allow you to quickly modify many aspects of the system to fit your business. Its simple on-screen tools allow you to create and modify fields, screens, tabs, tables, views, and scripts on-the-fly. The open architecture of SageCRM minimizes your development and maintenance costs and enables straightforward integration with other mission-critical applications.



● The interactive dashboard delivers a rich and personalized user experience that boosts productivity and helps drive user adoption across the business. Users can now manage all their activities from one place, and can view relevant content from Web and RSS feeds.

Benefits to IT:

Offers highly competitive total cost of ownership

Requires minimum configuration out-of-the-box

Lowers administration and deployment costs

Easily integrates with third-party applications

Offers integration with leading Sage ERP systems and Microsoft Outlook

Provides scalable solution to accommodate growth and change

Offers flexibility to adapt to unique business processes

Supports mobile and disconnected staff

Delivers enhanced security and privacy of customer and corporate data

Enables IT to spend more time on strategic projects rather than day-to-day issue resolution

INSERT LOGO HERE

<Insert partner company name>
<Insert partner company address 1>
<Insert partner company address 2>
<Insert partner Website> | <XXX-XXX-XXXX>



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