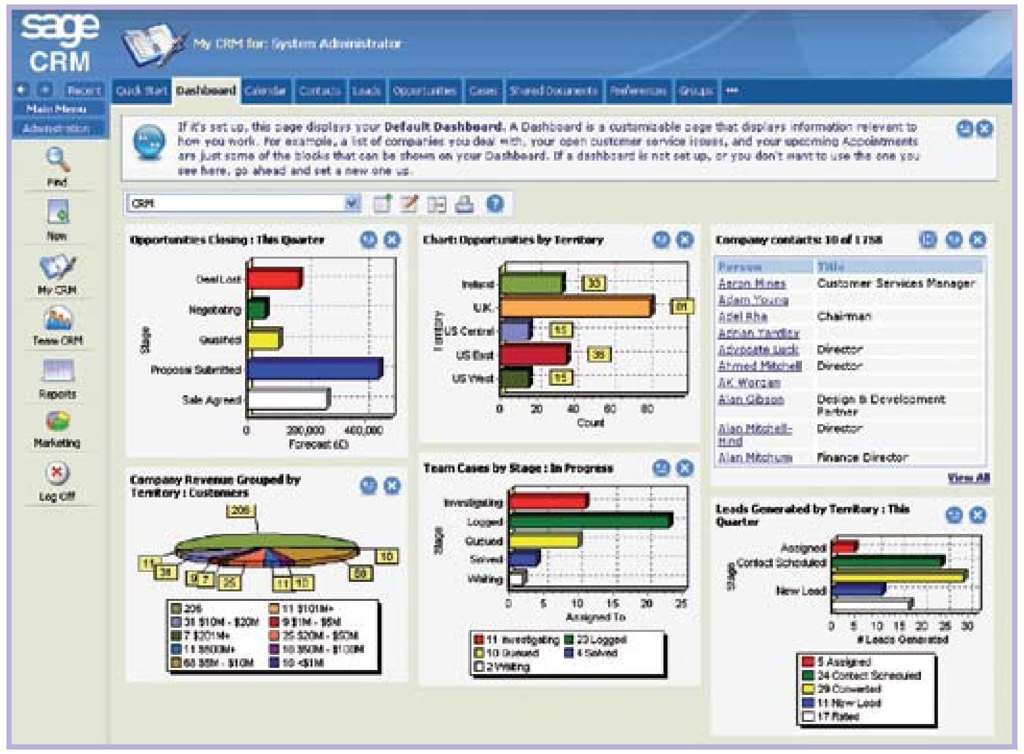
AlphaLogix
the logical choice

Sage CRM

Living breathing business

Sage CRM



Sage CRM Interface Dashboard.

"At Sage, we understand that mid-sized and larger businesses have varied and complex requirements. From accounting and payroll through to CRM and ERP, we offer scalable, integrated software to meet their needs."

Paul Stobart,
CEO, UK and Ireland Region,
Sage (UK) Limited

Contents

Sage is one of the world's leading suppliers of business management software and has been providing software and support to businesses like yours for more than 25 years. Over this time, we've built up a deep understanding of the needs of all sizes and types of business. Using this insight we constantly develop our products and services in order to meet customer requirements.

A network of support

Thanks to our unrivalled customer service and close relationship with Business Partners and Developers, we can provide the right business management solution for you - whatever the size and nature of your company. With over 5.2 million Sage customers worldwide - 700,000 in the UK, the network of people relying on Sage systems is growing - many include your customers and suppliers. In this increasingly connected world, becoming a Sage customer will enable you to do business more efficiently with the thousands of other companies who already rely on Sage.

What is Customer Relationship Management?

Imagine knowing a customer in great detail at any given time. You know how much business they did with you last month. You know that it was 15% more than in the same month last year. You know that this customer cares more about quality than price. You know they've had one customer service call in the last 12 months. You know the details of that conversation and every other interaction. You know this customer's business. You know their challenges. You know them with the familiarity of a longterm acquaintance. This is the power of Customer Relationship Management (CRM) from Sage.

CRM improves employee efficiency. It helps you to gain a complete view of your customer at any given time and has advanced reporting functionality, which provides a crucial basis for sales planning, marketing investment and tracking.
CRM is about understanding the buying habits and preferences of your
customers and prospects so you can:

- Build and strengthen customer relationships to keep them coming back.
- Provide value-added services that are difficult for competitors to duplicate.
- Improve your product development and service delivery processes.
- Increase company-wide awareness of your customer needs.
- Reduce customer frustration by not asking the same questions over and over.

By effectively integrating your marketing, sales and customer service functions, a good CRM system makes it easier for everyone inside your company to work together and share critical information. An effective CRM system empowers your customers and prospects to do business with you - the way they choose! Imagine connecting your customers to your employees and business partners across any department, through any process and via any communication device - phone, fax, email and internet.

"This means our company is now fully empowered to effectively identify and track new opportunities, cut overheads, boost sales, and increase customer satisfaction. And all thanks to Sage CRM."

Tim Oliver,
Group Marketing Manager for Tensar International, Blackburn.

Introducing Sage CRM

Sage CRM is an Internet-based CRM solution designed to bring the real benefits of CRM to your organisation. It's designed to be easy to use and deploy, affordable and packed with useful features.

Sage CRM uses industry-leading technology to encourage better business practices and efficient information exchange throughout your organisation. With Sage CRM, you can quickly analyse, manage, and synchronise sales, marketing and customer care activities across all points of contact.

Regardless of how, when or where your customers, partners, and prospects choose to interact with your company, Sage CRM gives you a decisive advantage by providing comprehensive, easy-to-use tools to successfully manage these relationships.

Versatile and comprehensive CRM

Sage CRM gives you superior flexibility and performance with advanced features, industryleading technology, and a robust architecture built to stand the test of time. It integrates seamlessly with Sage accounting and business management applications as well as linking with applications from the world's other leading suppliers.

Sage CRM includes:

- **Sales Force Automation**
  Sage CRM puts you in complete control of your sales pipeline, allowing sales teams to effectively manage, forecast, and report on all phases of the sales cycle. With Sage CRM, you can easily manage and analyse all current and historical account details and activities, manage multiple accounts and opportunities, and automatically distribute leads to sales professionals around the world. Point-and-click reporting and graphs offer your sales teams access to real-time data for on-thespot analysis and evaluation. By effectively analysing this information, you can acquire new clients and resell to existing ones.
- **Marketing Automation**
  Sage CRM provides a single source of customer information to help you better manage your marketing efforts and make sound decisions based on the needs of your customers and prospects. With Sage CRM Marketing, you can target the right customer at the right time, eliminate guesswork, and put your marketing resources to their best use. You can easily schedule and track marketing activities within a campaign and view every detail of each campaign.
- **Customer Service Automation**
  Sage CRM helps you to make the most of every customer interaction, maximising business opportunities and customer satisfaction. It brings together all of the critical information that you need to build and support long-term customer satisfaction and loyalty. With Sage CRM Customer Service, you can build and effectively manage lasting customer relationships by providing the professional level of service your customers expect. Sage CRM provides real-time access to relevant customer data including orders, call and escalation history, interactions, support cases, e-mail and documents sent and received, sales opportunities, and more.
- **Training and Coaching**
  Sage CRM offers exceptional user support. We have provided a welcome tab from which you can access online training videos, system quick tips, system documentation and more. We have also included unique onscreen coaching, allowing you to see customised text as you move from screen to screen. This built-in training makes Sage CRM even more user-friendly and helps your new users to get up to speed quickly. What's more, the embedded support functions gives increased user confidence, which, in turn should lead to greater acceptance of the system.
- **Look and Feel Like You**
  Sage CRM uses Themes providing each user the ability to change the look and feel of Sage CRM to match your corporate image. You can select any of the Themes from your own Preferences tab.

- **Web and Wireless Access**
  Sage CRM is a web-based application so all you need is an Internet connection and your password to access your full CRM system wherever you are in the world. Or if a connection is not available, you can also use the robust replication and synchronisation solution for full offline access. You can also access the system through a variety of wireless devices.

- **Web Self Service**
  Sage CRM Web Self Service lets your customers access information or request services and support over the Web whenever they want. Customers receive information based on their preferences, requests, and history through customised customer and partner portals.

- **Outlook Integration**
  Sage CRM has complete, twoway synchronisation with Microsoft Outlook contacts, calendar (appointments) and tasks, as well as enhanced e-mail integration. You can also use your entire Sage CRM system from within the standard Microsoft Outlook interface. Lastly, this comprehensive integration also allows you to synchronise your CRM data to pocket devices such as mobile phones and PDAs that synchronise with Outlook.

- **Automated Process Workflow**
  Using Sage CRM Workflow, you can introduce automated, pre-determined business rules across all channels, departments, and employees. To help you to assess and design your workflow even more easily, we have included graphical views of the process and its development patterns. This fully embedded workflow allows you to model how you would like your business to run and put in rules to ensure it happens. Pre-defined SLAs and escalation processes mean that your staff and customers can work to known, repeatable and automated processes, encouraging them to do the right thing every time.

- **Customisation tools**
  Sage CRM includes easy-to-use customisation tools, which allow you to quickly modify all aspects of the system and easily adapt the software to match your business. The open architecture of Sage CRM minimises your development and maintenance costs and makes integration into other missioncritical applications straightforward. Our simple on-screen tools allow your system administrators and managers to create and modify fields, whole new screens, tabs, tables, views and scripts on the fly. You can also apply field-level security using checkboxes at the Field level, without needing any programming skills at all.

"Sage CRM supports a culture of constant progress. With Sage CRM, the next step is automatically built into the process, so we're always moving forwards 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. It's not just on the most visible 'top ten' projects that Sage CRM adds value. It helps us to check that in chasing a new lead, salespeople are investing their time where it will bring best return."

Mark Lightowler,
Managing Director, Kaysersberg Plastics.

How can CRM support your business?

Sage CRM gives your customerfacing teams user-friendly tools allowing them to offer the best possible customer experience.

Improve Sales Efficiency

Sage CRM provides tools that help sales professionals find and retrieve vital information quickly and easily. Sage CRM provides a snap shot of the sales cycle from first contact to final sale, allowing sales teams to effectively analyse and manage the sales pipeline. You can easily create and save quotes and orders so that they can be quickly retrieved in the future, saving you time and meaning you can focus on selling instead of administration.

Manage and Track Campaigns

With Sage CRM, it's easy to view sales and marketing activities and objectives as well as leads generated and their follow up. You can drill down to specific activities within a campaign including communications, opportunities, responses, budget, actual cost and list of prospects. This in-depth view of your campaigns allows you to eliminate the guesswork and put your marketing resources to their best use.

Improve Customer Relations

We can help customer service professionals to efficiently resolve customer issues by providing them with user-friendly tools to access relevant customer data including purchases, call and escalation histories, interactions, emails and documents sent and received. Armed with this customer knowledge, they can handle customer queries more quickly, which enhances and strengthens the customer experience and improves their own job satisfaction.

How Sage CRM benefits Sales Teams

Every Day Tools for Effective Selling

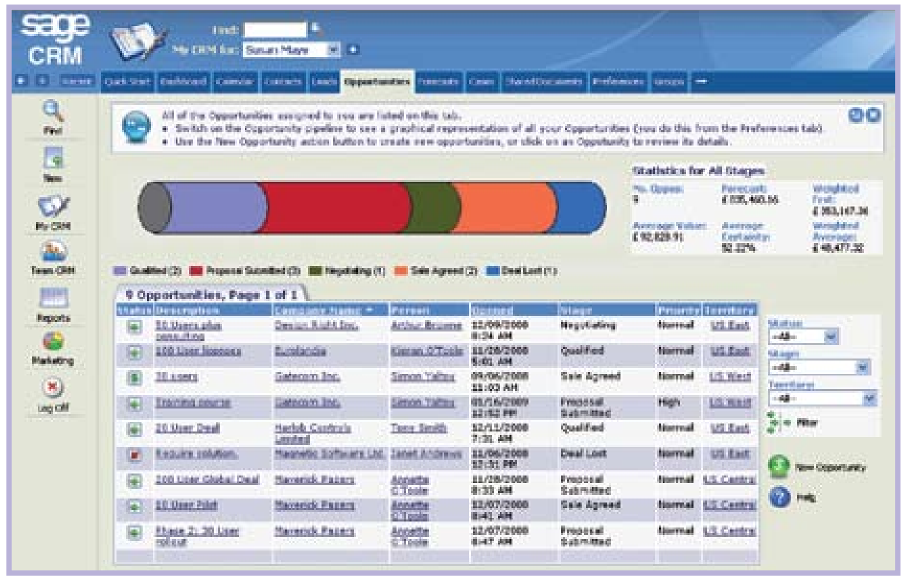
Sage CRM provides you with the tools you need to sell more effectively. It is an easy-to-use application that provides sales people with instant access to diaries, accounts, reports, pipelines, contacts, and call lists - in short, everything they need to get their job done. For your organisation, all this information is rolled up, tracked and reported on, giving continuous, meaningful and accurate reports on just how your sales team is performing.

Maximise Sales Effectiveness

Sage CRM helps organisations to grow revenue more quickly, providing sales professionals with key tools to help them focus on the right deal at the right time. In addition, Sage CRM provides a snapshot of the sales cycle from first contact to final sale, allowing your sales teams to effectively analyse and manage the sales pipeline. Sage CRM gives you access to the purchase history of every account so you can see who bought what and when. This helps you be certain that the value of each deal is being maximised. In addition, Sage CRM can help to build stronger relationships with your regular customers as discounts can be checked and given without delay.

Manage Sales Groups More Effectively

To help you with your sales management, Sage CRM delivers the essential reports, which let you know you know how the team is performing, who is winning business and who needs help. It eliminates the shocks and surprises that can destroy a good quarter. Sage CRM allows you to organise teams and schedule calls with simple point-andclick technology that co-ordinates and fills diaries. It brings control to your fingertips allowing you to sell lean and focus on the priorities.



Sales Pipeline and Dashboard.

"Sage CRM has helped us to open up more sales opportunities through better client management, without further expanding our sales force."

Gary Millner, Corporate Relations and Communications Director, the ifs School of Finance.

Sage CRM Sales Features List

Sales Forecasting & Reporting

- Accurate, timely forecasts allow your sales people and managers to make their own assessment of all leads, ensuring no leads are dropped or lost.
- Point-and-click reporting and graphs allow your sales teams to access data for on-the-spot analysis and decision-making.

Management of Vital Opportunities & Leads

- Track leads from first contact to final sales, ensuring time and energy is spent on the deals that are most likely to close.
- Manage and analyse all current and historical account details, making it easy for your sales team to identify and recruit new customers and resell to existing ones.

Build & Maintain Profitable Customer Relationships

- Deliver superior customer service by having the most up-to-date and complete customer information at your fingertips.
- Create more up-sell and cross-sell opportunities Account & Activity Management.
- Use escalation and reassignment of leads to ensure that the employee most qualified to handle the situation addresses your client's needs.
- Configure alerts to trigger literature fulfillment, follow-up appointments, callbacks, daily tasks and much more.
- Use security level assignment to ensure that only the right people see information relevant to them.

Territory Management

- Automatically route leads to the right sales person based on territory rules.
- Easily create, merge and move territories and the data associated with them.
- Gain insight into sales effectiveness and performance by territory.
- View marketing campaigns, response rates and associated sales revenue by territory.

Enhanced Outlook Integration

- Continue to run your e-mail, diaries and contacts through Outlook with auto-synch recording all interactions in CRM.
- Share all contacts, tasks and appointments between diaries in both systems to allow sharing of information.
- View CRM entirely through Outlook, allowing you to see the benefits of CRM but use a familiar interface.

Graphical Reporting

- Filter data any way you choose with graphical forecasting and reporting features.
- Use system default reports or easily create new reports with a reporting wizard that walks you through the process.

Escalation & Notification Alerts

- Ensure business opportunities are never missed, by sending real time alerts to the right individuals based on their roles.
- Deliver periodic messages to sales managers, summarising critical opportunity and forecast information for their direct reports.

Quotes & Order Entry

- Generate sales proposals, automatically reflecting local customer currency, customs charges and taxes.
- Access current product information, integrate with our accounting or your existing legacy systems and deliver the most upto-date quotes

'Stay on Top' Time Management

- Improve on business and personal performance with onscreen reminders, notification alerts, automation of literature fulfillment and the simplification of other nonrevenue generating activities.
- Monitor data proactively and automatically notify management of key business indicators.

Campaign Management

- Allow your sales teams to easily set up, run and maintain their own marketing campaigns such as letter or e-mail campaigns.
- View responses to each campaign, replicate effective initiatives and assign return on investment to each campaign.
- Integrate completely with marketing functions to allow instant feedback and information from a campaign to a sales person.

Access Anywhere Anytime

- Work offline or work online over a network or the Web, seamlessly synchronise between the two.

How Sage CRM Benefits Marketing Teams

Benefits for Marketing

Sage CRM provides powerful tools for managing, tracking and analysing targeted marketing campaigns. It is an easy-to-use application that provides marketing users with tools to target the right customer at the right time, eliminate guesswork and put your marketing resources to their best use. You can easily assign, schedule and track marketing activities and view every detail of each campaign at a glance.

Build a Detailed Profile of your Audience

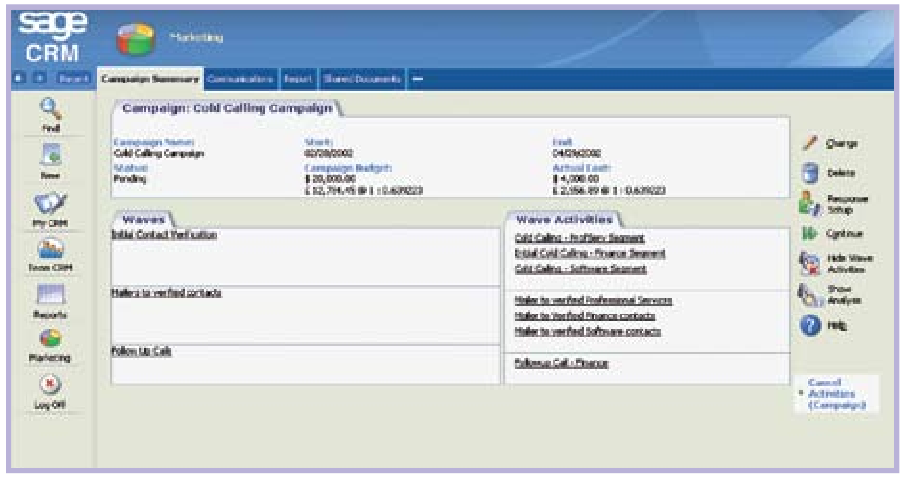
Sage CRM enables you to build up a detailed profile of your customers and prospects over the course of your business relationship. Our Groups functionality lets you organise records based on common characteristics; groups are sets of companies, people, opportunities etc. It's then easy to perform actions such as mass-emails, alerts, mail merges etc. Responses to your campaigns can trigger sub-lists for the next stage of the campaign with successful responses moved to sales and non-responses kept on a reminder list or removed if so requested. This information is easy to store, report on and segment for future campaigns.

Every Day Tools for Marketing Evaluation

With Sage CRM, you can view your campaign status at any time and successfully evaluate return on investment (ROI). Using sophisticated, user-friendly tools and reports, you can analyse marketing campaigns by lead sources or evaluate other important campaign details. Sage CRM not only tracks response rates, it also lets you match sales revenues to specific campaigns, providing immediate cost vs. sales analysis data.

Manage Your Marketing Mix

Sage CRM helps you to manage and track every element of your campaign. You can view activities, objectives, leads generated and lead followup. It's easy to drill down to specific activities within a campaign including communications, opportunities, responses, budget, actual cost and lists of prospects. This in-depth view of your campaigns allows you to eliminate the guesswork and put your company's marketing resources to their best use.



Marketing screenshot.

Control Your Telemarketing Campaigns

Sage CRM provides your telemarketers with the key tools to be effective. You can automatically schedule calls for the telemarketers and the outcome of calls can trigger the development of the next stage of the campaign. Details of calls can be saved and shared throughout all departments for future reference. We have built in call length and outcome recording capabilities, as well as a connector to CTI which allows all of your call automation and recognition tools be integrated into your CRM solution.

Sage CRM Marketing Feature List

Campaign Management

- Assign, schedule and track marketing activities within a campaign and view every detail of each campaign at a glance.
- Drill down to specific activities within a campaign including communications, opportunities, responses, budget, actual cost and lists of prospects.
- Segment your audience (based on product interest, demographics etc)
- Retain successful data for future campaigns.

Segmentation & Groups

- Segment customer and prospect lists using user-friendly tools.
- Deliver targeted messages to select groups or target audience.
- Export marketing lists to Microsoft Excel for external agencies.

Outbound Call Management

- Easily integrate telemarketing into any marketing campaign.
- Allocate and schedule target lists and calls.
- Schedule follow-up calls at times convenient for prospects and customers.
- Save details of calls and share this throughout the company.

E-mail Management

- Make it easy to distribute mass e-mail by providing the ability to send HTML e-mail, create e-mail templates and send attachments.
- Store all communications about a particular campaign, so that employees can easily look up the exact e-mail message received by a specific customer or prospect.

Campaign Reporting

- Get real time information about the success of individual and ongoing campaigns by tracking them from initial lead generation right through to close.
- Match sales revenues to specific campaigns, providing immediate cost vs. sales analysis data.
- Analyse marketing campaigns by lead source using user-friendly tools and reports.

Graphical Reporting

- Filter data any way you choose with graphical forecasting and reporting features.
- Use system default reports or easily create new reports with a reporting wizard that walks you through the process.

Lead Management

- Qualify leads into your chosen criteria for follow-up.
- Prioritise leads ensuring no lead gets lost or goes cold.
- View the lead at every stage using powerful lead-tracking functionality.

List Management

- Create target lists from selected criteria, re-use successful campaign lists or import mail house lists.
- Merge documents with target lists for mass mail-outs.
- Create interactions and record marketing pieces sent for future reference.

How Sage CRM Benefits Customer Service Teams

Every Day Tools for Customer Service

Sage CRM gives your customer service staff the tools they need to develop real, lasting and beneficial relationships with customers. There is no better example of a department where the right technology and approach can transform a cost to the business into a potential profit centre than in customer service. With this in mind, we built Sage CRM to deliver key functionality with a low cost of ownership and easy to use tools that allow you to put service excellence at the heart of your business.

Resolve Customer Issues Efficiently

Sage CRM lets you keeps track of every customer interaction meaning that your customer service teams have the most up-to-date and complete customer information at their fingertips. This information helps them to effectively and efficiently resolve service issues and create cross-sell or up-sell opportunities.

Empower Your Customers - Offer Multiple Channels

Sage CRM lets your customers help themselves by providing them with web access to their own 'customer portals', which can be accessed at their convenience 24/7. These password protected, self-service areas on your website allow customers to log queries, make service requests, view the status of existing or past requests - anything that they would find useful. This customer self-service area can be easily customised to incorporate the look and feel of your company website, ensuring that your company's brand remains consistent through all customer touch points.

Find the Right Information Quickly

Sage CRM allows you to bring all transactions and communication history into a single screen, giving your customer service professionals a 360-degree view of customers. With user-friendly tools, they can access relevant customer data including purchases, call and escalation histories, interactions, emails and documents sent and received. All this customer information is stored in one central location, allowing teams in any office location to access and share vital customer information. Armed with this customer knowledge, you can handle customer queries more efficiently, which in turn enhances and strengthens the customer experience.

Customer Service (cases pipeline).

Sage CRM Customer Care Feature List

Case Management

- Capture and track every interaction with every customer regardless of customer touch point or channel of communication.
- Maintain a complete case history with instant access to all previous issues and customer interactions.

Activities & Communications

- Assign, schedule and track phone calls and meetings and view records of previous meetings.
- Send e-mails (plain text or HTML) and attachments and record communication for future reference.
- Attach documents - for example, white papers, quotes, brochures - from the document library.

Reporting

- View and measure call turn around time and understand what is taking longer to resolve and why.
- View issues by category, outstanding and unresolved issues.
- Pull graphical reports for weekly, monthly or quarterly management meetings.

Knowledge Management

- Share customer information internally or externally to allow customers and partners to resolve their own issues.
- Build a library of solutions to common customer issues to help the customer service team resolve issues faster.

Customer Self Service Portal

- Provide your customers with web access to their own 'customer portals', which they can access at their convenience 24/7.
- Empower customers to log queries, make service requests and view the status of existing or past requests.
- Customise your self-service portal to match the look and feel of your corporate identity, ensuring your corporate brand is kept consistent through all customer touch points.

Escalation & Notification

- Set up rules to automatically escalate cases if not closed within a certain time period.
- Receive notifications automatically when cases are not resolved within a certain amount of time.
- Receive notification instantly through e-mail, web browser, phone etc.

Ticket Tracking

- Never lose an issue/service request in the organisation by tracking and recording of all requests through all stages of response.
- Date-stamp all issues at time of resolution or escalation for internal management and external auditing of service.
- Ensure ownership and accountability over requests by making the representative working on the ticket always visible as the ticket moves.

Easy Integration for a Clearer View of your Business

Sage CRM is available as a powerful stand-alone application and also as an integrated part of the wider Sage suites. Sage CRM forms a key part of our software suites allowing you to access integrated back-office customer information such as credit status:

- **Sage 1000** - Sage 1000 uses the business ‘rules’ developed over many years in Sage Line 500 and Sage CRM products to create a single application that can be used business-wide. Sage 1000 removes the barriers between different parts of an organisation, driving operational efficiency and improving customer service. Sage 1000 covers Financials, Commercials, Manufacturing and other functions. Other software such as Sage Asset Manager is becoming available which will form part of a wider Sage 1000 suite over time.

- **The Sage 200 suite** - This suite has been designed specifically for mid-sized businesses in all sectors of industry and commerce, typically with a turnover of £1-20m. The philosophy behind the Sage 200 suite is to provide you with the means to implement integrated business processes that are flexible enough to match the way you work. The concept is simple; Sage 200 suite provides you with integrated software for every part of your business. This includes the powerful functionality from Sage 200 CRM, and, over time, software to control finance, distribution, retail, manufacturing, construction, services and internal processes such as asset management, forecasting and human resources.

- **Sage Accpac Extended Enterprise Suite** - Two award winning products, Sage CRM and Sage Accpac ERP come together to form the foundation of this suite. By dynamically linking processes, information, workflows and communication channels, the Sage Accpac Extended Enterprise Suite helps organisations bridge the information gap between departments and improve customer interactions.

Notes

For more information contact your Sage Business Partner:

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sage

AlphaLogix
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