

Sage CRM Whitepaper

Sage CRM 2010 Product Vision

November 2008

Table of Contents

□ EXECUTIVE SUMMARY	1
□ INTRODUCTION	1
□ SAGE CRM SOLUTIONS 2010 STRATEGY	2
□ THE SAGE CRM PRODUCT VISION	4
Interoperability	4
Anywhere Workforce Experience	5
Integration Between Front and Back-Office Environments	6
□ WHY FRONT-TO-BACK-OFFICE INTEGRATION IS IMPORTANT FOR SMB ORGANISATIONS	6
The Challenge of Effective Management	7
□ FRONT-OFFICE OR BACK-OFFICE ORIENTATED PURCHASE REQUIREMENTS	8
□ DELIVERING AGAINST THE SAGE CRM PRODUCT VISION	10
Extending Sage CRM's Integration Capabilities	10
Extending Sage CRM's Core CRM Capabilities	13
Extending Sage CRM's Web Capabilities	15
□ A COMPREHENSIVE TECHNOLOGY STRATEGY	16
Common Components	16
Service-Based Integration	17
SaaS Business Platform	17
Context Aware Services	18
□ CONCLUSION	18

EXECUTIVE SUMMARY

Sage has recently published a powerful and pragmatic vision for the company's family of CRM and contact management solutions. The Sage CRM Solutions 2010 Strategy (CRM 2010) articulates a bold and uncompromising product strategy which puts user needs squarely at the centre of product development, and is accompanied by an impetus to deliver real, compelling enhancements within a timeframe that makes sense for our customers.

As a companion to CRM 2010, Sage is pleased to publish an enhanced vision for the Sage CRM product line. The Sage CRM Product Vision seeks to deliver in highly practical terms against the objectives of CRM 2010, and expands significantly upon the integration focus which has been fundamental to the development of the Sage CRM application to date. It also discusses the comprehensive technology strategy that will support this compelling product vision.

INTRODUCTION

It's easy to see how increased globalisation, unprecedented customer sophistication and borderless transacting have all had a dramatic effect on the purchasing landscape of every industry over the last ten years. As a supplier and consultative partner for over 5.8 million customers across the globe, Sage has an important perspective on how these changes have impacted upon every variety of business. Companies today, regardless of their size or location, have to contend with constantly changing market conditions, deep customer complexity and wide ranging competitive pressures. In short, business has never been more challenging. The opportunities, however, have never been greater; particularly for small and mid-sized companies.

Technology has been a key driver and enabler of this change process. The Internet, eCommerce, integrated telephony and mobile technologies have produced new and innovative customer touch points and experiences. For example, websites, interactive voice recognition and messaging services are now commonplace and complement traditional business channels. These new models have even supplanted their more established peers entirely in some instances; underscoring their unique ability to increase customer satisfaction whilst also lowering cost. In particular, we have found that more and more of our customers today want to empower their customers through self-service channels. Anywhere, anytime service delivery is fast becoming the standard. As a result, purchasers today, regardless of whether they are businesses or consumers, expect to be able to deal with their suppliers on their terms and through their preferred channels.

While all of these innovations have been good news for the customer; suppliers, on the other hand, have struggled with these new channels and interaction models. Capturing, tracking and aggregating customer information throughout this increasingly fragmented customer experience has become far

more difficult. Deep customer insight has become more elusive as a result; business processes have become infinitely more complex, and this combination has impacted directly on service delivery and the profitability of customer relationships over the long term.

It is hardly surprising, therefore, that we have seen a huge increase in the use of CRM applications over the last several years to address these challenges. Nowhere has this been more apparent than within small and mid-sized businesses. SMBs have benefited greatly from the increased availability of packaged CRM applications from companies like Sage, and CRM growth within this segment has exploded as a consequence. This is a trend that is likely to continue over the next two years with analyst firm, Gartner, forecasting that SMB technology adoption will be a significant driver of overall CRM market growth during this period¹.

SAGE CRM SOLUTIONS 2010 STRATEGY

As the largest provider of CRM solutions to SMB organisations globally², and therefore a company with unrivalled insight into SMB needs, Sage is uniquely positioned to provide continued industry leadership and innovation in this important product segment. In order, therefore, to underscore our vision and cement our commitment to this area, we have published a powerful and pragmatic strategic vision which covers our entire family of CRM and contact management solutions.

CRM 2010 is based on over eighteen months of deep research and analysis in the SMB marketplace, and puts our customer's business objectives at the very heart of our product strategy. As part of this process, we analysed the product strategy of a number of our industry peers. In many instances, we found that delivery timelines were too lengthy to have any significance or meaningful benefit for their users. Moreover, several focussed disproportionately on a single, technology-led, area of product strategy such as Software-as-a-Service or Outlook integration. And while we agree that these are important components of the CRM ecosystem, we believe that our customers benefit most from a product strategy which focuses on their business objectives, and where technology innovation happens on multiple fronts, and is directly aligned to tangible commercial benefits. CRM 2010, therefore, is designed to provide highly practical benefits for Sage customers; in many instances, delivering compelling product innovations as early as 2008, as well as over the medium-term through to 2010.

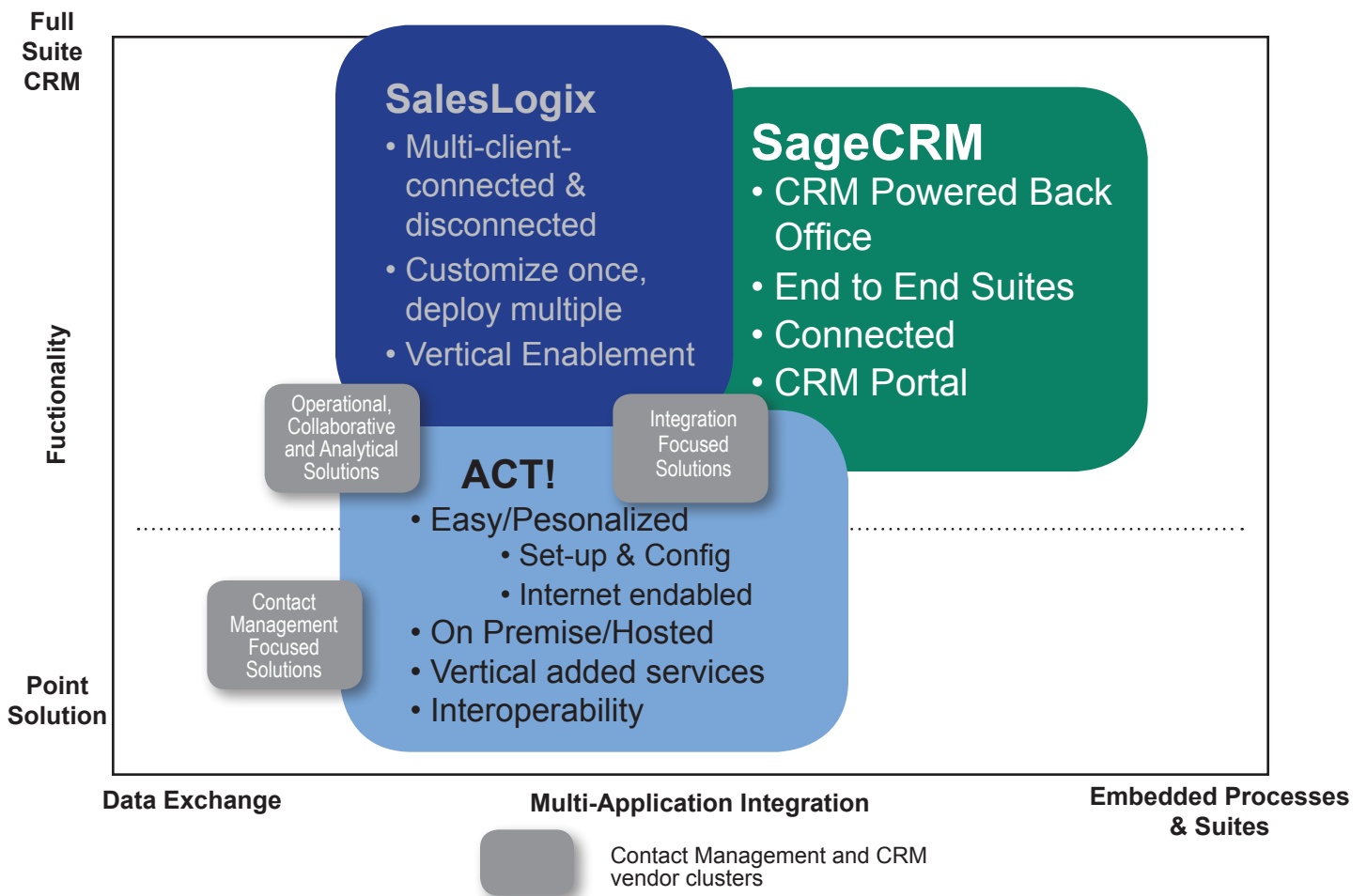
¹Source: Market Trends – Customer Relationship Management Software Worldwide 2007 to 2012, Gartner Dataquest

²Source: CRM Competitive Landscape, Gartner 2008

As can be seen from the diagram below, three elements will differentiate our Sage CRM Solutions products in the marketplace. The first is interoperability between the contact management and CRM solutions. Customers enjoy their solution today, but retain flexibility to easily move to or co-exist with another Sage CRM Solutions product in the future. The second, anywhere workforce, enables a powerful and rich user experience and extends

CRM functionality through practical combinations of on-demand/on-premise applications and services. And finally, the connected front and back office further differentiates Sage by providing solutions that deliver depth of functionality and integration, without compromise. These elements are supported by a comprehensive technology platform which is built on current and emerging standards; including Web 2.0.

Figure 1: Sage CRM Solutions Products



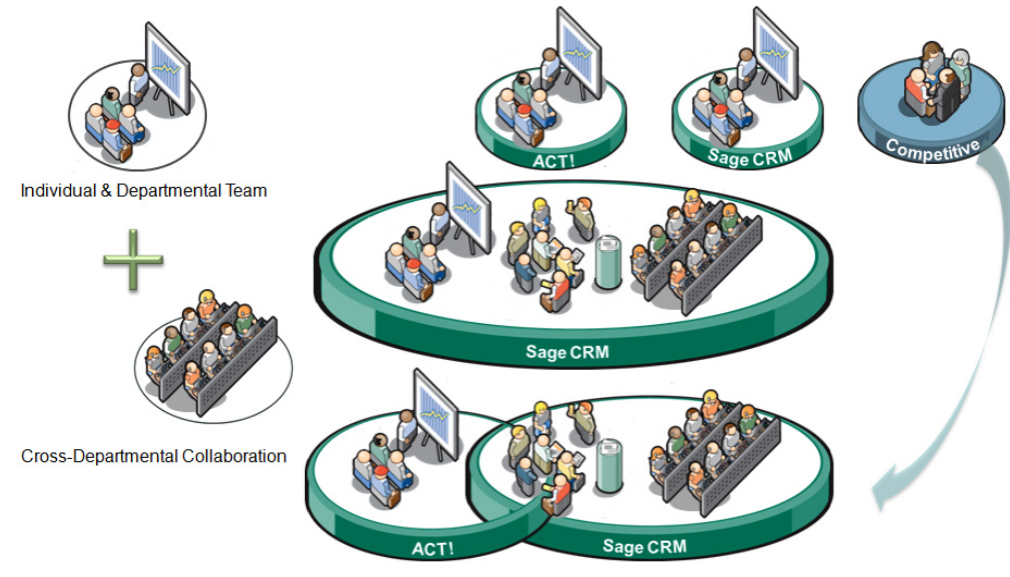


Figure 2: Enhanced Interoperation Capabilities of Sage CRM

THE SAGE CRM PRODUCT VISION

The Sage CRM product vision is set against the backdrop of the CRM 2010 Strategy and seeks to deliver, in highly practical terms, against its three central objectives. Substantial foundations for many of these product capabilities and technology components are already in place today, and this, therefore, will enable Sage CRM to accelerate the delivery of its product vision. This represents a significant advantage for our customers and a unique proposition for Sage in the CRM industry.

Interoperability

A unique differentiator for Sage within the marketplace is its strength in both contact management and CRM. ACT! by Sage is the market-leading contact and customer manager with more than 2.8 million users worldwide and 43,000 corporate customers with ten user licenses or more per organisation. As these companies scale or become more complex in their operations, they have the opportunity today to migrate to Sage CRM using packaged migration tools, which ensure the most time and cost effective path to addressing their requirements.

In the future, full interoperability between these two solutions will remove the need for formal data migration. Organisations will also be able to deploy ACT! and Sage CRM simultaneously with customer data shared across both applications. This will enable specific users or departments to continue using ACT! while users elsewhere in the organisation use Sage CRM. This will ensure that users benefit from the most appropriate level of functionality for their needs and that companies maximise the usage and value of their CRM software assets.

For example, ACT! could be used by the residential division of a large real estate company where the realtors generally deal with their clients on a one-to-one basis. In the same company's commercial division, however; where realtors generally collaborate with each other to maximize their opportunities, Sage CRM could be deployed simultaneously to address their particular needs. And with full interoperability and data sharing between the two applications, the company's customer service department could manage the customer experience across both residential and commercial divisions in an entirely seamless fashion. This example illustrates the significant flexibility and choice that Sage customers will benefit from in the future through the enhanced interoperation capabilities of Sage CRM.

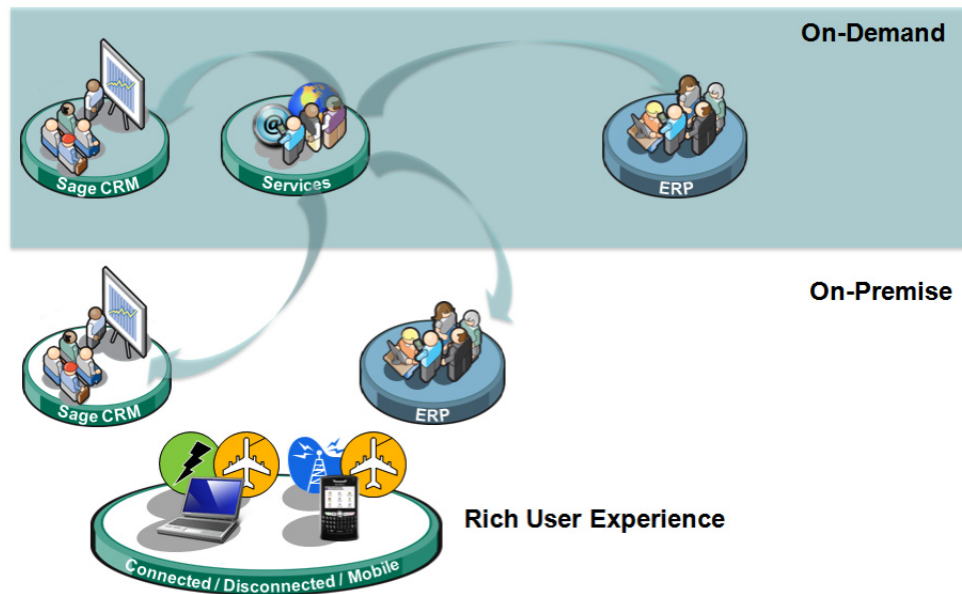


Figure 3: Integration Between Front-Office and Back-Office Environments

Anywhere workforce experience

As a fully web-architected solution, Sage CRM is delivered today on-premise or on-demand from the same codebase; providing deployment choice without functional compromise. Additionally, the product provides a consistent, rich user experience regardless of user access through a desktop or mobile device. This means that users have the ultimate flexibility in how they use their CRM application; ensuring that they can be productive in more places, more of the time.

In the future, the anywhere workforce experience will be enhanced further by a range of new on-demand services. These services will provide a wide variety of incremental capabilities that will be designed to work seamlessly with Sage CRM across both on-demand and on-premise deployments. This will provide significant flexibility for customers who will be able to add new capabilities quickly and cost-effectively to their Sage CRM deployment in line with changing business requirements. Context-aware services, for example, could provide field-based sales executives with maps and directions for contacts or accounts that they have

selected in Sage CRM; enabling them to maximise their daily route planning and sales calls. This combination of applications and services (both on-demand and on-premise), coupled with a rich, consistent Sage CRM user experience which works regardless of location or access scenario, will be a very significant differentiator in the marketplace; particularly when compared to pure-play on-demand vendors.

Integration between front-office and back-office environments

Sage CRM provides out-of-the-box integration with several, market-leading Sage ERP solutions today. This allows users to leverage ERP-derived data and functionality seamlessly within their Sage CRM user experience. A salesperson, for example, can access a customer's invoice history or check the current inventory for a particular product prior to taking a new order. They can also access the specialist price configuration capabilities of their ERP solution when preparing a quote. Sage CRM's link and sync capabilities ensure consistent customer information across both the front-office and back-office environments at all times.

Front-to-back-office integration remains the focal point for the Sage CRM product vision and we are committed to building out this area significantly going forward. In particular, we will look to deliver across three core integration themes:

1. ERP-aware front-office
2. CRM-powered back-office
3. Cross application portal

The sections that follow examine the challenges facing SMB organisations in relation to front-to-back-office integration and provide further details on how Sage CRM will deliver against these three themes going forward.

WHY FRONT-TO-BACK-OFFICE INTEGRATION IS IMPORTANT FOR SMB ORGANISATIONS

During our preparation of the Sage CRM Product Vision, we conducted research on the challenges that SMB organisations face in relation to customer management and broader business operations. The list below details the pain points that surfaced consistently.

- Limited visibility on customer data
- Business process bottlenecks
- Increased debtor days
- Errors in order management
- High administrative expense
- High inventory volumes
- Delays in processing orders
- Cashflow issues
- Late deliveries to customers
- Invoices are disputed/queried
- High customer attrition
- Margin erosion

Significantly, all of these issues are directly or indirectly associated with disconnected information, departments and applications. Moreover, our findings mirrored those reached by analysts Gartner and Yankee Group in independent research which has been carried out over the last several years.

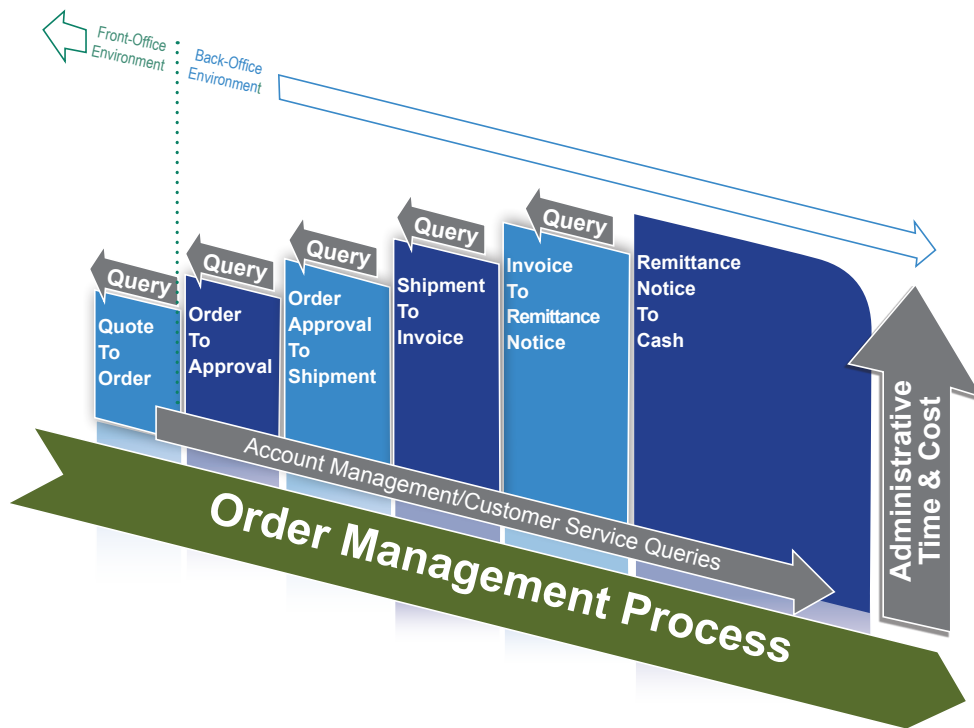
A recent Gartner research project, for example, suggested that significant information 'blindspots' still persisted after the roll out of many CRM projects due to inadequate integration between the front-office and back-office environments³. More recently, it reported that nearly 22% of spend in large-scale CRM projects during 2007 focussed on building the foundations for end-to-end business process management⁴. Similarly, Yankee Group surveys on SMB applications revealed that 45% of respondents believed that lack of integration between departments and critical business applications was the single biggest technology challenge that they faced. High integration costs were also cited as a particular problem.

Front-office employees use CRM products to support customer-facing activities such as sales pipeline management, marketing campaign orchestration and customer service delivery. Back-office employees, on the other hand, depend on accounting and ERP applications to support activities such as invoicing, collections, cashflow management and financial reporting. This combination of factors has resulted in the operation of two parallel, but separate customer datasets; one in the back-office which is financial, transactional and quantitative in nature, and the other in the front-office which, by contrast, is non-financial, interactional and qualitative. As a result, business applications have struggled to address key business process needs where the customer lifecycle crosses the front-to-back-office divide, resulting in: (1) departmental silos of information, (2) unnecessary administrative overhead and inefficiencies, (3) verbal sign-off requirements and (4) process duplication. These issues can impact materially on company performance, and a practical example of that is detailed on the next page.

³Source: Key issues for CRM strategy and implementation, Gartner 2006

⁴Source: Three tactical CRM trends to consider through 2009, Gartner 2007

The Challenge of Effective Order Management



Given the number of potential parties and stages involved in order management: (1) account management, (2) sales order processing, (3) shipping and (4) accounts receivable, errors or omissions at any point in the process can be costly and time-consuming. Additionally, front-office staff, such as account managers or customer service agents, may struggle to provide order status updates to their customers because of limited visibility on the transactional information contained in the back-office system.

The workflow management capabilities of today's ERP and CRM applications have gone some way in addressing these issues by introducing exceptions monitoring, mandatory fields and removing the need to re-key and re-check information as transactions pass from one stage to the next. This in itself, however, does not fully address order

management if the back-office environment remains disconnected from the front-office system. If a member of the sales team, for example, generates a quote based on out-of-date pricing information or stock availability, and subsequently converts this quote into a customer order, it is likely that this error will only be identified later at the order approval or shipping stage. The order will need to be passed back to the salesperson for correction and then re-processed by the finance department. As a result, order completion is delayed for the customer, administrative cost increased for the company and workload is unnecessarily duplicated for sales and finance staff. Clearly, where this scenario arises on a regular basis, it will impact negatively, and significantly, on overall customer satisfaction, as well as increasing transactional cost on an exponential basis.

The aim of front-to-back-office integration, therefore, is to bring together disconnected business processes (e.g. quote-to-order and order-to-cash as part of the overall order management process), applications (CRM and ERP) and datasets (financial data and non-financial), and translate them into a mechanism to: (1) manage customer relationships more effectively, (2) reduce costs, (3) increase profitability and (4) achieve sustainable competitive advantage over the long

term. Accordingly, the overriding objective for Sage CRM, within the context of CRM 2010, is to make it easier than ever for SMBs to leverage the benefits of front-to-back-office integration without the cost and complexity associated with the area previously. And while integration will be a focus for the entire family of Sage CRM Solutions, including Sage SalesLogix and ACT! by Sage, it will be realised most comprehensively within the Sage CRM product.

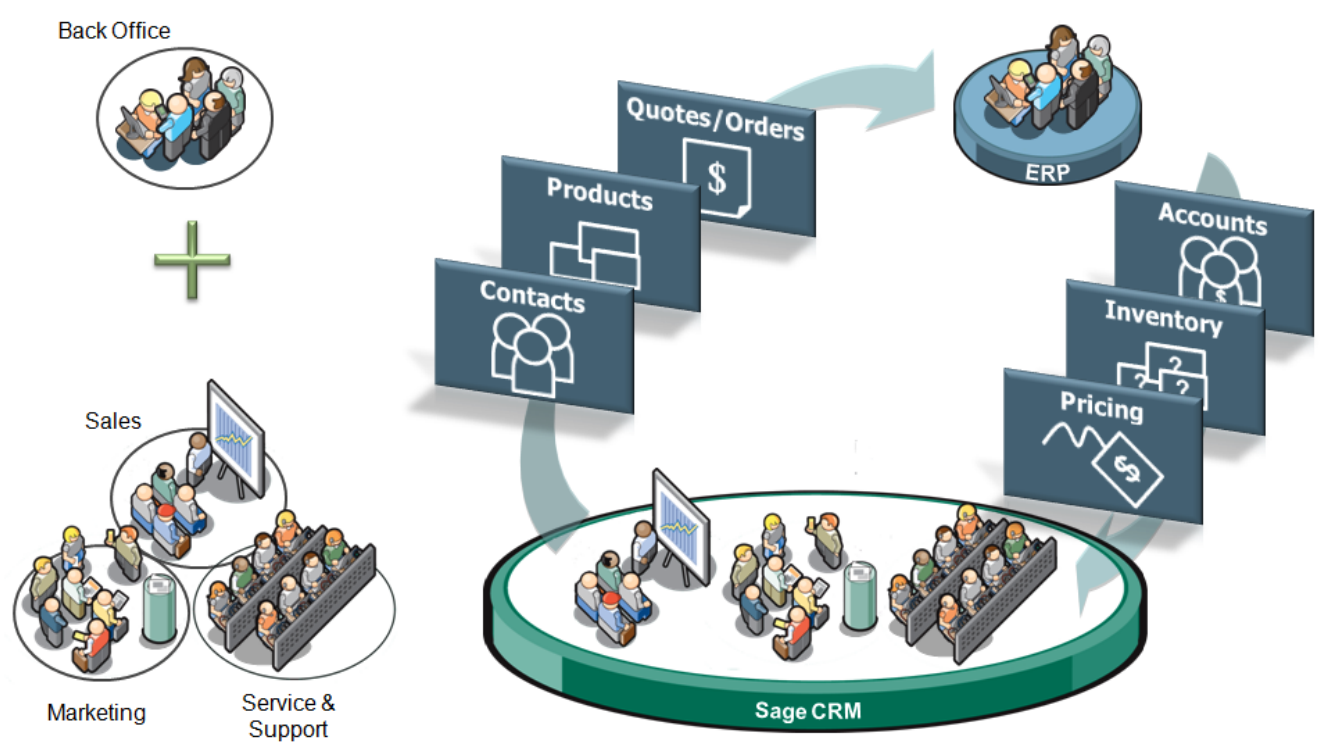


Figure 4: Front-Office Or Back-Office Orientated Purchase Requirements

³A corporate customer is defined as an organization that purchases a corporate license for 10 users or more.

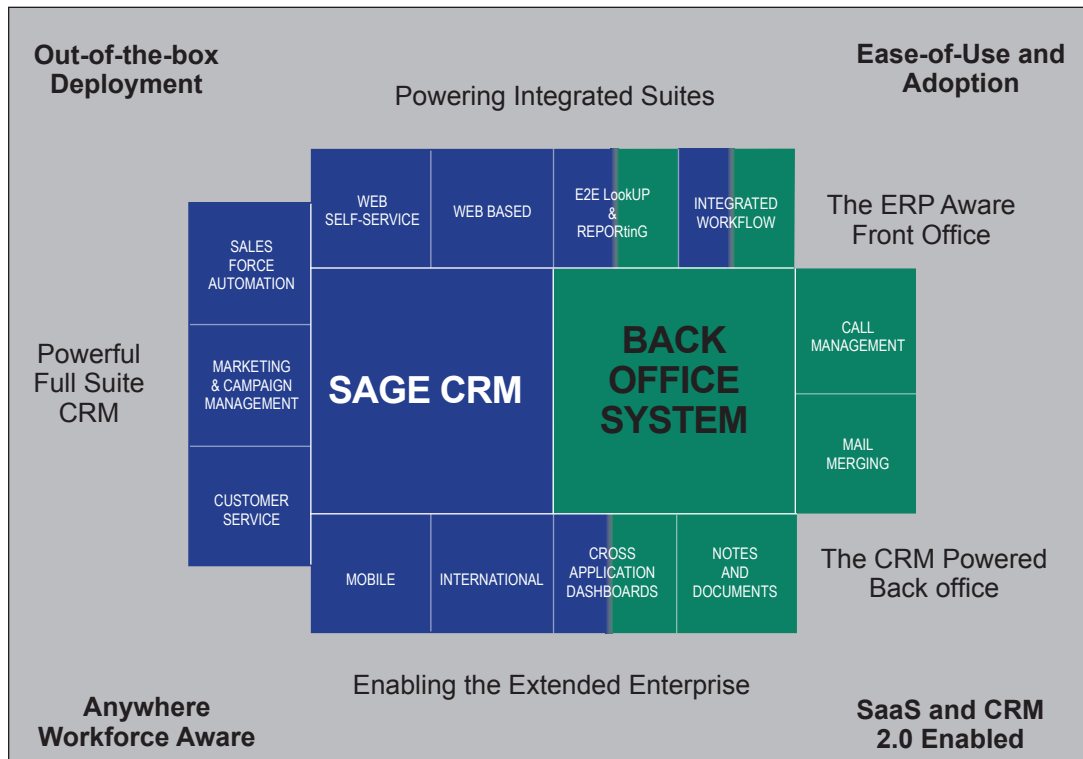
FRONT-OFFICE OR BACK-OFFICE ORIENTATED PURCHASE REQUIREMENTS

Sage interviewed two distinct categories of software decision-maker during our research: (1) those aligned primarily to front-office operations and (2) those aligned primarily to back-office operations. While CRM applications have an important role in both categories of decision maker, there were significant variances in the prioritisation of functionality and the preferred scope of any potential solution.

Our research revealed that front-office-orientated decision-makers; typically senior executives in sales, marketing or customer service functions, continue to seek out solutions that enable them to pursue three traditional core objectives: (1) develop deeper customer insight, (2) foster customer-centred collaboration across team members and (3) provide a consistent and seamless customer experience on an on-going basis. There is, however, greater demand today for access to non-CRM data and functionality in order to improve user productivity and customer insight. Sage CRM's product strategy for this category of decision-maker, therefore, focuses on the provision of a powerful, web-based CRM solution which also surfaces ERP-derived data and functionality to users seamlessly and intuitively. We refer to this as the ERP-aware front-office.

Back-office orientated decision-makers, on the other hand, are more likely to use the finance department as the bridgehead for projects which extend business applications throughout the organisation, and potentially beyond to external parties such as suppliers. They are more likely to purchase a CRM solution within the context of an overall systems replacement project. In particular, they are motivated by solutions that deliver cross-functional capabilities on a consistent basis and co-ordinate workflow orchestration on a unified basis. Significantly, these decision-makers not only demand the complementary capabilities that ERP systems deliver to front-office users (as described in the ERP-aware back-office section above), but also need to leverage the collaborative and workflow management capabilities of CRM applications in order to add value to their back-office knowledge workers; referred to as the CRM-powered back-office. Sage CRM's product strategy for this category of decision-maker, therefore, focuses on the delivery of solutions and suites which will provide a fully realised, CRM-at-its-core, front-office and back-office environment which is founded upon a consistent look and feel throughout the application, along with common components across areas such as reporting, analytics and workflow.

Figure 5: Sage CRM Solution Overview



DELIVERING AGAINST THE SAGE CRM PRODUCT VISION

Sage CRM continues to provide a comprehensive, best-in-class CRM solution which offers functional depth and breadth to users, as well as ease of deployment and support, and a low total cost of ownership (TCO) for SMB organisations. Accordingly, our product vision details the wide ranging enhancements that will come on-stream within the product's core functional capabilities and platform over the period to 2010. Additionally, by enhancing Sage CRM's already significant integration capabilities, the product will also deliver a range of exciting and highly innovative features for both front-office and back-office users alike. These features will be provided on a low-cost, low-complexity basis; a significant advantage for SMB organisations. These developments are summarised in the diagram above and discussed in further detail in the sections that follow.

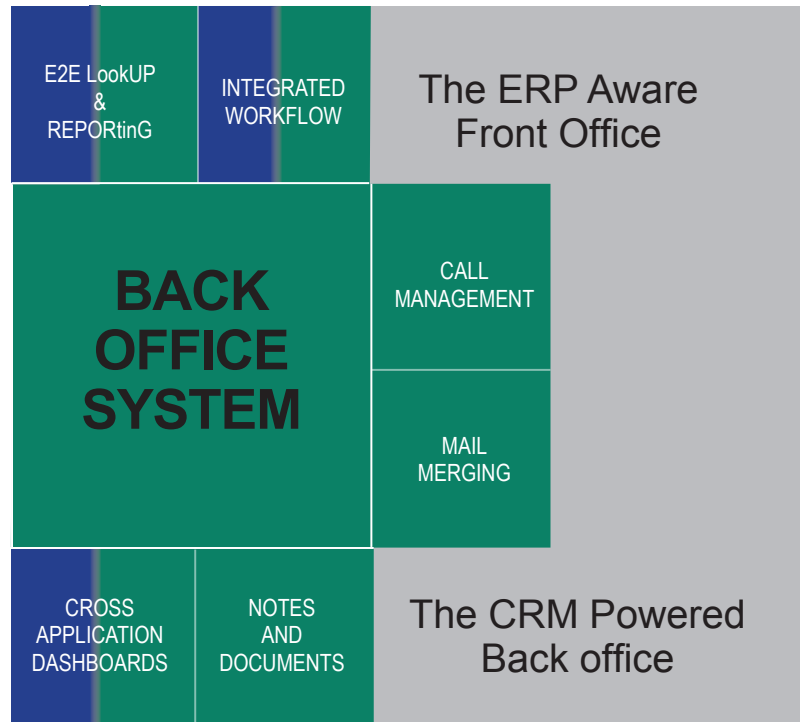
Extending Sage CRM's Integration Capabilities

Integration capabilities today

Sage CRM already provides out-of-the-box integration with a wide range of market-leading Sage ERP products today; enabling CRM users to leverage ERP-derived data and functionality seamlessly within their front-office activities. Sales users can, for example, access customer transaction history to establish if an invoice is past due, or configure pricing for a quotation using functionality and data derived directly from their ERP system. Today, Sage CRM is available to companies as a standalone solution which can be integrated with their incumbent Sage ERP system, or as part of single Sage Extended Enterprise suite.

Integration capabilities in the future

The Sage CRM product vision commits to build upon this already considerable platform for front-to-back-office integration. In the future, Sage CRM will provide



customers with even greater choice around their incumbent business systems; enabling them to derive real value from unified customer data and end-to-end business processes, regardless of whether they require a CRM solution that integrates with a pre-existing Sage ERP installation, or are replacing multiple, disparate, third-party systems with a single, fully-integrated Sage Extended Enterprise Suite. The Sage CRM Product Vision will deliver significant benefits to front-office and back-office users alike. We will be building out three areas in particular to support the delivery of this vision: (1) the ERP-aware front-office, (2) the CRM-powered back-office and (3) the cross application portal.

1. The ERP-Aware Front-Office

The Sage CRM Product Vision continues to deliver against our objective of providing a truly ERP-aware front-office system. It will empower front-office users further by giving them unprecedented access to key ERP capabilities which can be fully defined in accordance with business needs. Recent developments, such as the introduction of a new trading account entity, underpin this strategic vision and facilitate accurate synchronisation between data points

across the front-office and back-office environments. In the near future, Sage CRM's virtual entity capability will make it possible to surface ERP-derived entities such as shipment date, credit limit or invoices through the CRM interface in a highly customisable fashion. This translates into limitless flexibility around the ERP information and services that can be delivered, in-context, to front-office users. Additionally, it will be possible, out-of-the-box, to leverage combined front-office and back-office data in Sage CRM within dashboards, reports, mail merges and customer segmentation activities. Common workflow orchestration across the front-office and back-office environments will provide Sage CRM users with zero process disconnect, eliminating manual process bottlenecks and improving transaction accuracy throughout. Critically, ERP business logic is respected at all times facilitating decentralised empowerment while ensuring centralised control and governance at the same time. Finally, Sage CRM's integration capabilities will continue to be made available to customers out-of-the-box; without the need for expensive middleware or integration services.

2. The CRM-Powered Back-Office

A substantial market differentiator for Sage CRM will be its facility to enable back-office users to leverage core CRM capabilities within their Sage ERP system. This will add extensive collaborative and workflow management capabilities to their back-office environment. Other specific examples include:

- Back-office users can schedule activities against back-office account records e.g. remittance reminder calls.
- Back-office users can add or maintain notes, or capture customer interactions associated with back-office entities such as invoices.
- Cross application workflow can be used to fully managed activities such as credit control.

- Documents relating to back-office entities such as accounts, credit notes or invoices can be held in CRM.
- Self-Service capabilities enable customers to securely access account, invoice, payment or delivery details online; reducing the need for them to contact the accounts department with day-to-day enquiries.

3. The Cross-Application Portal

Building on the product's already extensive web-based customer self-service capabilities, a cross-application portal will be incorporated into Sage CRM. The Sage CRM cross-application portal will provide a highly customised and personalised user experience which will allow individuals to quickly surface and aggregate

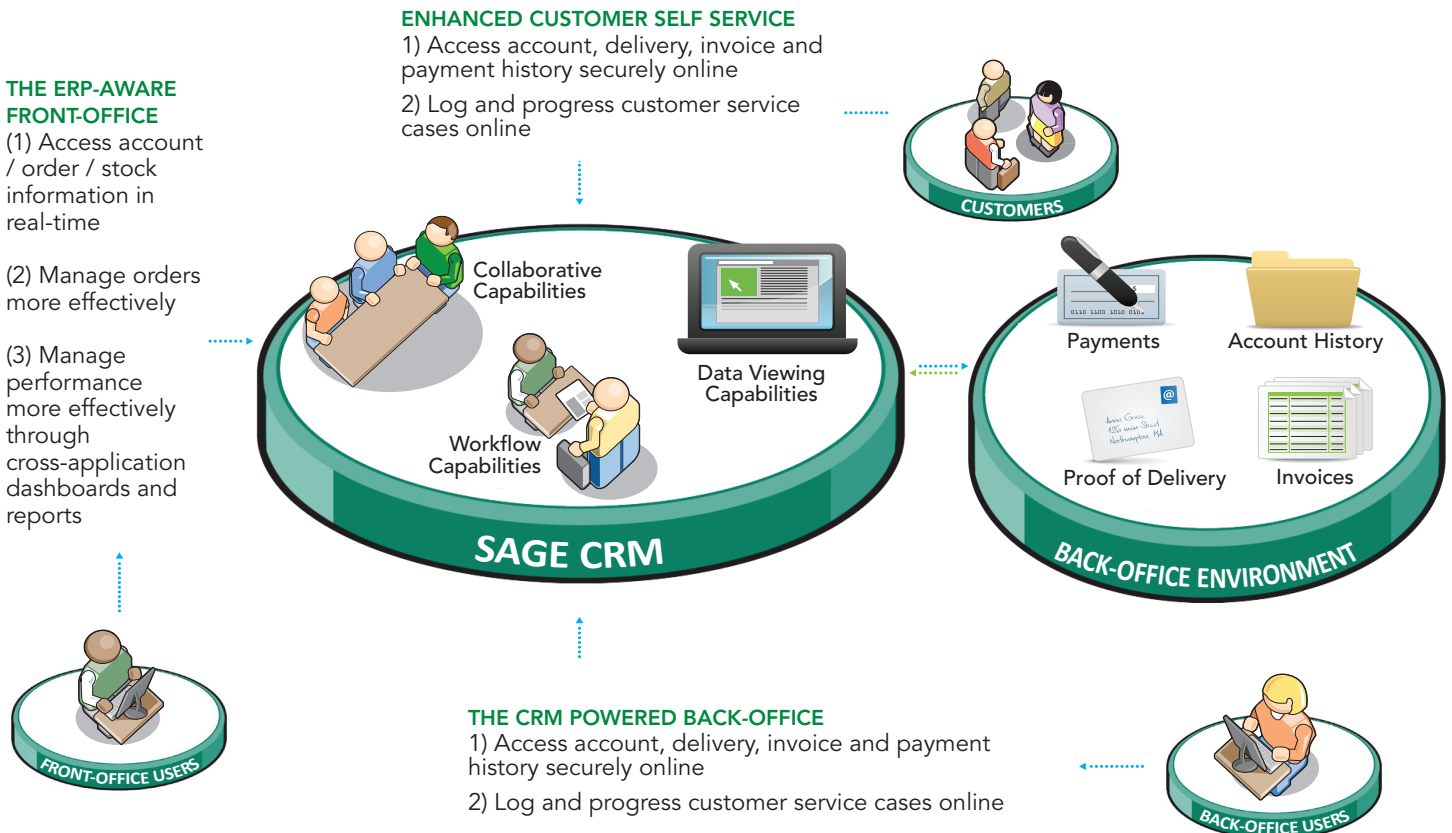


Figure: 6 Extending Sage CRM's Integration Capabilities

all of the key information and functionality that they need to do their job on a daily basis. Using Sage CRM's deep integration with the Sage back-office environment, the portal will allow users to bring together CRM and ERP capabilities within a single, intuitive, web-based interface. Significantly, the cross-application capabilities of the Sage CRM portal will mean that reports and dashboards can be configured to deliver tailored, performance analysis across a wide range of KPIs, regardless of whether their underlying data resides in the front-office or back-office or both.

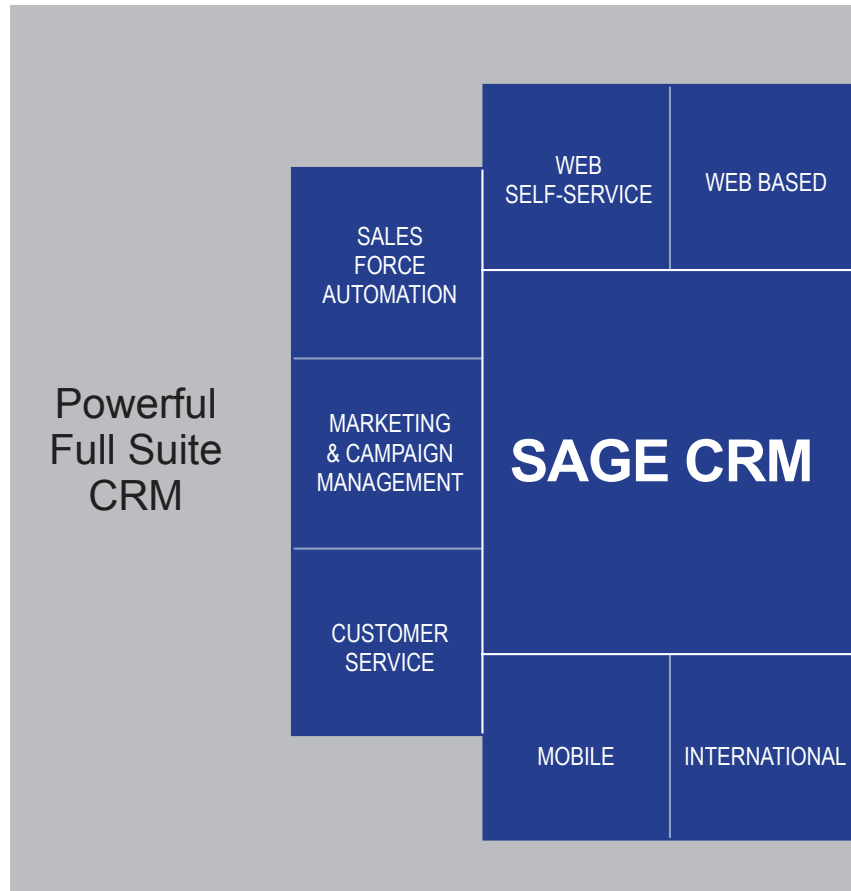
Extending Sage CRM's Core CRM Capabilities

Core CRM capabilities today

Today, Sage CRM is a powerful, multi-award-winning, full suite CRM solution which provides extensive out-of-

the-box capabilities across: (1) contact management, (2) sales force automation and management, (3) marketing and campaign management and (4) customer service automation. Designed to drive user adoption, Sage CRM provides on-screen coaching throughout and a full suite of training tools to assist frequent and occasional users alike. The product is easy for users to set up and configure with the ability to personalise their experience through wizards and codeless customisation. As a fully web-architected solution, users access it through their browser in their familiar and easy-to-navigate web interface. Sage CRM also integrates seamlessly with office productivity applications such as MS Outlook, Word and Excel. Sage CRM's core current functional capabilities are summarised below.

Sales	Marketing	Customer Service	Cross Functional
<ul style="list-style-type: none"> • Contact management • Account management • Activity management • Calendar management • Pipeline management • Opportunity management • Territory management • Order management • Team collaboration 	<ul style="list-style-type: none"> • Campaign management • Lead management • Document management • Mail merge • Web-to-lead • Outbound call management • Template-based mail/email 	<ul style="list-style-type: none"> • Customer self-service • Incident management and escalation • Call management • Case management and tracking • CTI Integration 	<ul style="list-style-type: none"> • Workflow • Dashboards/Reporting • Multi-lingual/ Multi-currency



CORE CRM CAPABILITIES IN THE FUTURE

While we believe that Sage CRM provides a highly compelling combination of price, performance and functionality for the SMB market today, we will continue to broaden and deepen the product’s core capabilities on an on-going basis. Unlike other solutions in the marketplace, Sage believes that SMBs should not be required to carry out extensive

configuration and customisation to achieve core capabilities around their primary front-office activities. Future product enhancements will leverage Sage CRM Solutions’ technology strategy and a range of common components that will span our entire family of CRM products. A selection of Sage CRM’s core current functional capabilities are summarised below.

Sales	Marketing	Customer Service	Cross Functional
<ul style="list-style-type: none"> • RSS feeds • Social networking • Relationship mapping • Enhanced Outlook integration 	<ul style="list-style-type: none"> • Advanced email marketing • Enhanced response management • Dynamic online surveys 	<ul style="list-style-type: none"> • Enhanced knowledge base 	<ul style="list-style-type: none"> • Enhanced mobile deployment • Enhanced reporting and business intelligence • Enhanced web-based self-service

Extending Sage CRM's Web capabilities

Web capabilities today

Today, Sage CRM is provided on-premise or on-demand. Because both models are based on the same codebase, customers have complete choice without having to compromise on functionality or ease-of-deployment and maintenance. Additionally, because the product is entirely web-architected and has fully published web-services APIs, customers can integrate rapidly and cost-effectively with on-demand services as well as variety of Web 2.0-based innovations such as online communities, blogs and wikis. This provides for substantial extensibility over the lifetime of the solution.

Web capabilities in the future

One of the major innovations planned for Sage CRM's SaaS platform is the ability to integrate the Sage CRM on-demand solution with Sage ERP products. This, again, will expand upon our vision to make front-to-back-office integration available to SMBs on a low cost, low complexity basis. Our customers, therefore, will benefit from the unprecedented choice as to how they wish to utilise their business applications without any compromise with regard to functionality or integration. Additionally, we will begin to build out substantial capabilities around Web 2.0 and context-aware services to deliver more capabilities out-of-the-box for our customers. RSS-enabled consumption of content, for example, could be used to propagate trading updates against a particular company record within Sage CRM.

A COMPREHENSIVE TECHNOLOGY STRATEGY

A comprehensive technology strategy underpins the Sage CRM Product Vision, providing a roadmap and architecture for the development of compelling Web 2.0 services, as well as the seamless consumption of Sage-provided and partner-provided on-demand services by the product.

The technology strategy creates significant value for our customers including:

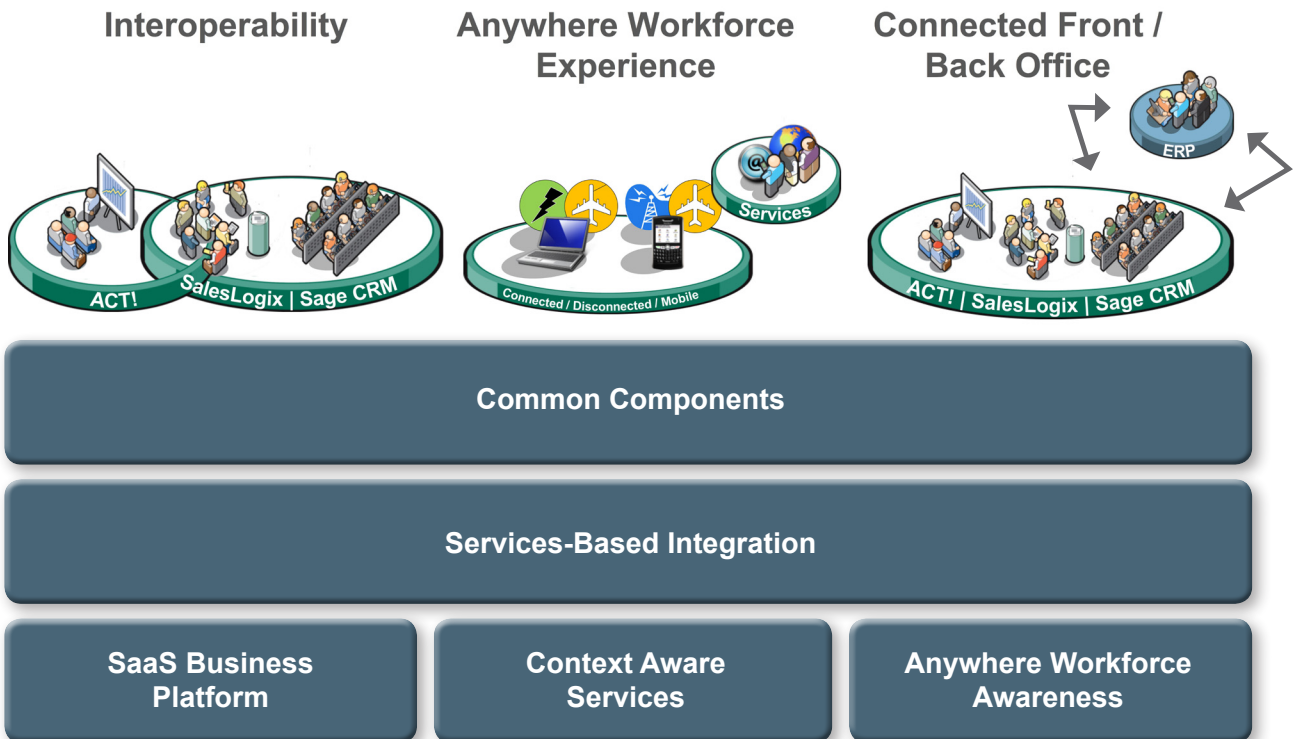
- Flexibility: organisations can benefit from Sage CRM Solutions' common components approach to development, enabling them to combine new software modules easily as their business requirements change over time.
- Integration: organisations can manage end-to-end business processes seamlessly with best-in-class, standards-based, integration to Sage back-office applications, as well as interoperation with other Sage front-office solutions such as ACT!.

- Software as a Service (SaaS): organisations can choose to access their applications on-premise or on-demand.
- Internet Services: organisations can extend their Sage CRM installation easily by attaching a portfolio of value-added, on-demand services.
- Access Awareness: organisations can choose to access Sage CRM, whether connected or disconnected, from a range of devices such as rich clients, Web terminals, and smart phones, confident that the best user experience is always available.

Common Components

The Sage CRM product vision is supported by a practical programme for adoption of common components and frameworks across the product lines. While initially focused on new feature development, where the biggest ROI is likely to be obtained, the programme will eventually encompass strategic areas, which would benefit from a common approach across applications. The list of common components will evolve and change

Figure 8: 2010 Technology Strategy Elements



as new features are introduced, however, these will likely encompass:

- Common user experience with a set of components, including icons, navigation, wizards, setup, and look and feel.
- Common approach to business intelligence, supporting the connected, integrated, and standalone markets for CRM.
- Shared data access layer components, allowing high fidelity access to supported databases without necessitating the traditional overhead of multiple database support
- Common approach to workflow management which is not limited to actual components for design and rules execution, this will also encompass a common approach across applications to handling information under the “control” of workflow and a common format for exchange of information for workflow enablement.

Services-Based Integration

Since version 6.1 of the product, Sage CRM has supported web-services based integration with other applications through a common CRM integration contract known as the Integration Framework. To date, the Integration Framework has been used to deliver integrations with Sage ERP products such as: Accpac ERP, MAS 90/200, Sage 100, Sage 200, Sage 1000 and OfficeLine.

Services-based integration is a key strand of the CRM 2010 technology strategy, and an approach that will be applied to other Sage CRM Solutions in the near future. A particular advantage of this approach is that it is independent of any particular implementation. Any service provider or service consumer, therefore, can implement the contract. This leads to flexible, lightweight, loosely-coupled integrations. Each application can choose to publish information, as well as consume information. This same system is then used to generate feeds of information from the CRM application so that customers can view information through a standard Web browser or feed reader.

The system can be used for simple third-party application integration, or building composite applications such as simple sales ordering, stock control, and credit management. Third-party developers could make full use of this system to read and write information in Sage CRM.

Finally, Sage CRM Solutions progress towards the adoption of new Web-Oriented Architecture (WOA) standards such as Really Simple Syndication (RSS), Atom (a simple way to read and write information on the Web), and Representational State Transfer (REST) to ensure that the integration capability of the products evolve to provide services-based integration from all product lines. The benefit of services-based integration is having a single API that could be used to query, update, and index structured data in Sage CRM and integrate these with such data in other third-party applications and on the Web.

SaaS Business Platform

The 2010 technology strategy includes further enhancements to the SageCRM.com SaaS business platform. These enhancements will support the roll-out of further SaaS applications, and complementary, context-aware services. In particular, they will facilitate: (1) easy, simple, on-demand deployment and provisioning, (2) single sign-on and authentication services and (3) intelligent metering that accommodates flexible licensing and billing. Additionally, the SaaS business platform will provide better support for multi-tenancy requirements. We believe that support for a one-to-many relationship between the application and the customized user databases provide the greatest user flexibility, while maintaining operational efficiencies in deployment and upgrades.

Context Aware Services

Sage CRM will leverage context aware applications and services extensively. Context aware services take information from an external, web-based source to add value to the core information contained in Sage CRM. The resulting, context-specific data combination can then be delivered to users through the Sage CRM portal as widgets. Widgets could, for example, be used to leverage LinkedIn data in relation to a contact stored in Sage CRM, or to leverage GPS data relevant to a customer's office location. Moving forward, there will be more converged benefit from the use of enhanced device capabilities, context aware services and Sage CRM.

A key objective of the Sage CRM product vision is to support the anywhere workforce experience. Customers expect continual access to their CRM information, regardless of device, connectivity, or type of information they seek. Sage CRM, therefore, needs to be aware of the network connectivity and capabilities in order to provide the optimum user experience. Moreover, customisations should also be available across all supported access scenarios in order to provide a rich consistent user experience. Sage CRM also needs to be user aware, taking into account the user role, security, and preferences, as well as direct and indirect context of the request. While many of these capabilities are available today in Sage CRM, we expect to build out the level and extent of the anywhere workforce experience on an on-going basis. In particular, our continued investment in the Sage CRM product platform will deliver even further browser and mobile device support for our users.

CONCLUSION

In a challenging, complex and ever changing business environment, the Sage CRM Product Vision sets forth an innovative, practical and well-thought-out proposition for SMBs. In particular, it delivers a comprehensive set of integration-derived benefits beyond what has been traditionally associated with CRM solutions, and far beyond what has been available to SMB organisations off-the-shelf to date. Over the lifetime of their solution, therefore, companies using Sage CRM can expect to leverage significant benefits through: decreased administrative cost, increased customer satisfaction and greater revenue opportunities; all of which translate into sustainable competitive advantage over time. Additionally, with advances in solution interoperability, an extensive delivery trajectory around the anywhere workforce experience and the transformational CRM 2010 technology platform, companies can ensure that their users have access to the application that is most appropriate for their requirements, and that they can be productive in more places, more of the time. In conclusion, the Sage CRM Product Vision, therefore, represents a highly compelling and secure proposition for our customer's IT investment today, and well into the future.

About Sage CRM

Sage CRM is an easy-to-use, quick-to-deploy Customer Relationship Management solution comprising Sales, Marketing and Customer Service Automation. Highly flexible, Sage CRM comes with fully customisable business process automation and offers out-of-the-box integration with leading Sage ERP applications. Sage CRM is a fully browser-based application and is available on-premise or on-demand for complete freedom of choice.

Sage CRM equips sales, marketing and customer service teams with the tools they need to find new customers, close sales faster and build lasting, more profitable relationships across all channels. Regardless of how, when or where customers, partners and prospects choose to interact with your business, Sage CRM provides a decisive advantage by delivering a comprehensive, easy-to-use system to successfully manage these relationships. Out-of-the-box it delivers tight integration with leading Sage

ERP applications, breaking down departmental silos, connecting your front office and back office and providing total visibility and control right across your business. Through its powerful workflow engine, Sage CRM drives organisation-wide, straight-through business process automation. Thanks to its open architecture and web services interface, Sage CRM also enables easy integration with other business applications and on-demand services, making it more relevant to your business and delivering better business management.

Sage CRM is part of the Sage CRM Solutions portfolio of market-leading applications which also includes ACT! by Sage and Sage SalesLogix. Over 56,000 organizations and 3.1 million users worldwide rely on Sage CRM Solutions to develop profitable, long-term business relationships.

Asia

210 Middle Road
IOI Plaza #06-04
Singapore 188994
+65 6336 6118

www.sageasiapac.com

Australia/New Zealand

Level 6, 67 Albert Ave
Chatswood, NSW 2067
Australia
+61 2 9921 6500

www.sagebusiness.com.au

Belgium / Luxembourg

Quai Mativa 23
4020 Liège
+32 4 343 77 46

www.sage.be

China

23F CitiGroup Tower
33# Hua Yuan Shi Qiao Road
Shanghai China 200120
+ 86 21 61010019

www.sagesoft.cn

France

Immeuble le Colisée II
10 rue Fructidor
75834 Paris CEDEX 17
France
+33 (0)825 00 87 87

www.sagecrm.fr

Germany

Emil-von-Behring-Str. 8 – 14
60439 Frankfurt am Main
Germany
+49 (0)69 50007 0

www.sage.de

India

100, First Floor
Okhla Industrial Estate Phase-III
New Delhi-110020
+91 11 41002490 (D)
+91 11 41002488 (B)

www.sagesoftware.co.in

Ireland

3096 Lake Drive
Citywest Business Park
Dublin 24
Ireland
+353 (0)1 642 0863

www.sage.ie

Middle East

Office No. 315, Building 12
P O Box 500198,
Dubai Internet City
Dubai

United Arab Emirates

+971 (4) 3900180

www.me.sage.com

North America

8800 North Gainey Center Drive
Suite 200
Scottsdale, AZ 85258
+1 800 975 5441

www.sagesolutions.com

South Africa

Softline Enterprise
Softline Technology P-ark
102 Western Services Road
Gallo Manor Ext 6, Woodmead, 2191
+27 11 304 2500

www.softlineenterprise.co.za

Spain

Labastida, 10-12
28034 Madrid
España
+34 91 837 35 05

www.sagecrm.es

Switzerland

Oberneuhofstrasse 3
6340 Baar
+41 41 769 68 68

www.sageschweiz.ch

United Kingdom

Sage (UK) Limited
North Park
Newcastle upon Tyne
NE13 9AA
+44 (0)800 44 77 77

www.sage.co.uk