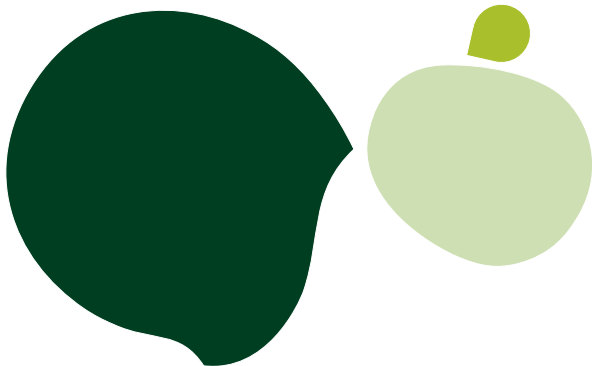


Communicate, Collaborate, Compete  
with Sage CRM



CRM - Customer Relationship Management - is more than just a software application. It is a business solution for all customer-centric processes. It covers every interaction with customers across the entire business. It improves internal business processes, enables closer management of new and existing customer relationships, increases revenues and decreases

inefficiencies and provides management with timely and reliable insight to guide decisions.

With customers in over 70 countries worldwide, Sage CRM is an award-winning, web-based customer relationship management solution. It is a full suite CRM solution comprising sales, marketing and customer service automation.

Over ten thousand customers across the globe use Sage CRM every day to manage and maximise the performance of their business and in particular their sales, marketing and customer service activities.

- Sage CRM offers customers a rapid route to value through its focus on ease-of-use, ease-of-deployment, ease-of-integration and ease of access anytime, anywhere.



## BENEFITS OF SAGE CRM TO YOUR BUSINESS

Ensures your sales, marketing and customer services 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

Minimises administration costs

Protects and grows your revenues

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

Maximises customer communications and interactions through integrated social media channels

## FEATURES AT-A-GLANCE

### FOR ALL USERS

- Easy to use with fresh look and feel
- Fully customisable interactive dashboard
- End-user personalisation of interface design and content
- In-built user tutorials, user guide and quick tips
- Relationship management graphs
- Impactful visual charts and highly graphical reports
- Real-time synchronisation between Sage CRM and MS Exchange for seamless calendar management
- Dynamic linking of multiple information sources on a single dashboard screen
- Centralised meeting management
- Full calendar response management
- Fully customisable graphical workflow

### FOR SALES PROFESSIONALS

- Pre-installed sales dashboard available out-of-the-box
- Ability to customise dashboard to create a bespoke workspace
- Account, contact and opportunity management
- Ability to create key accounts dashboard
- Sales forecasting and territory alignment
- Calendar and activity management
- Process and workflow automation
- Provides iPhone and Blackberry users with critical access to real-time information
- Escalation and auto notifications
- Quote and order entry

### FOR IT PROFESSIONALS

- Out-of-the-box customisation
- Easy to install and fast to deploy
- Easy to integrate
- Flexible deployment options
- Advanced customisation capabilities
- Single point of entry for Sage CRM and MS Exchange integration for ease-of-administration and rapid new user setup

### FOR MARKETING PROFESSIONALS

- Pre-installed marketing dashboard available out-of-the-box
- Multi-channel campaign management
- Fully integrated e-marketing functionality
- Open, click and bounce rate tracking for e-marketing campaigns
- Automated drip marketing campaigns
- Attention grabbing templates out-of-the-box
- Easy campaign cloning
- Lead qualification and management
- Mail merge functionality
- Full marketing workflow
- Outbound calling
- List management
- Customer segmentation capabilities

### FOR CUSTOMER SERVICE PROFESSIONALS

- Pre-installed customer service dashboard available out-of-the-box
- Ability to customise dashboard to create a bespoke workspace
- Customer self-service portal
- Case tracking and management
- Workflow automation
- Knowledge base recording customer service solutions
- Address maintenance and linking tools
- Escalation and auto notifications

### INTEGRATION CAPABILITIES

- Sage ERP integration
- MS Exchange integration
- MS Outlook integration
- Social media integration
- Web-self service

# The Sage CRM Interactive Dashboard

The Sage CRM interactive dashboard revolutionises the way you manage your business and how your employees manage their day. The interactive dashboard delivers a rich and personalised 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.

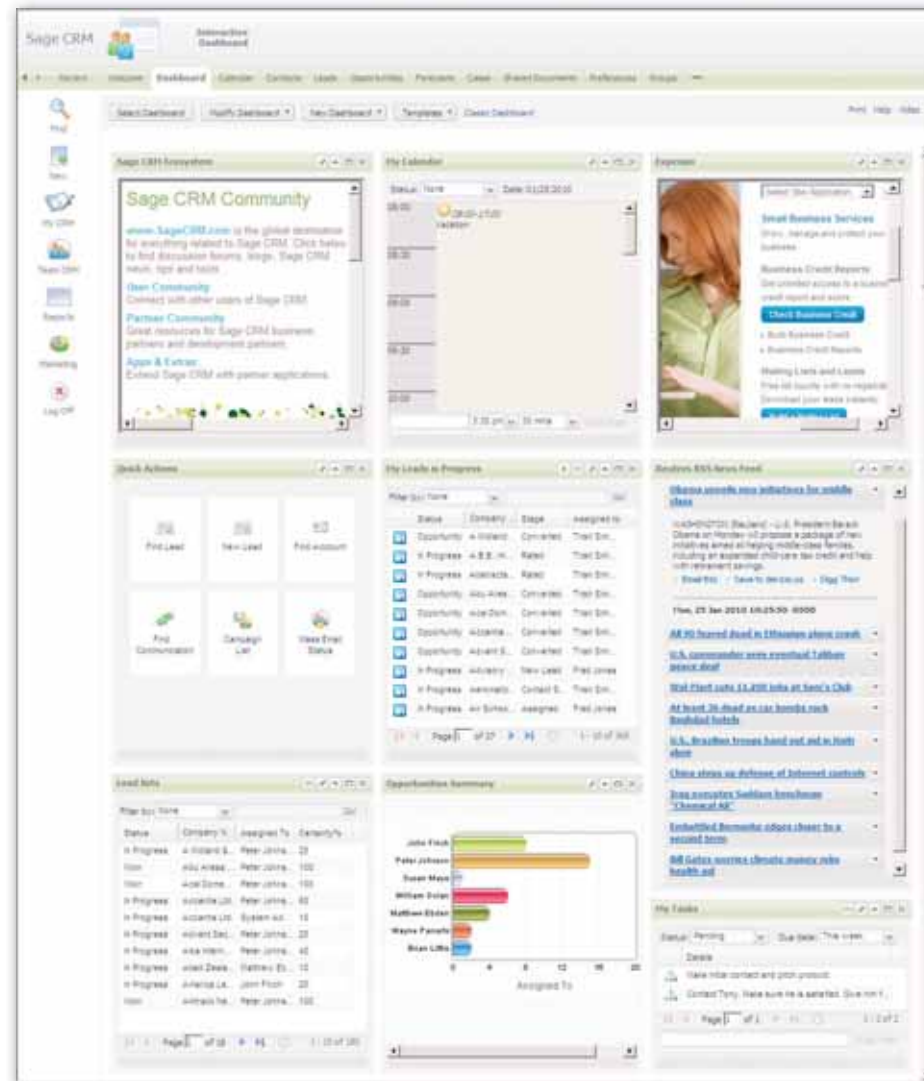
Users can define their own personalised and intuitive workspace from a series of gadgets and web feeds ensuring that all content is relevant to their needs, enhancing the user experience and maximising the productivity of your staff.

Using innovative drag and drop functionality, users can re-size and re-position gadgets, enabling them to personalise 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. Users can manage their sales pipeline, check stock control from integrated Sage ERP systems, monitor industry news content, manage their calendar and appointments and control and process leads all from the same screen in real-time.

The Sage CRM Interactive Dashboard enables users to dynamically link multiple gadgets on a single screen, maximising user productivity. 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.

## BENEFITS OF THE SAGE CRM INTERACTIVE DASHBOARD

- Enhances the user experience through a range of personalised options
- Boosts staff productivity
- Empowers users to control and action activity from a single workspace
- Single view of relevant and comprehensive information enables businesses to make informed decisions
- Fully customisable layout using drag and drop technology for rich, user-driven experience
- Pre-installed role-based dashboards for Sales, Marketing, Customer Services and Management, delivering relevant content and immediate productivity gains for users and teams
- Out-of-the-box integration with LinkedIn® providing users with powerful networking opportunities direct to their dashboard
- Easy integration of web and social media sites, maximising relevant content and customer-connectedness across the organisation
- Provides multiple information sources on a single screen
- Enables users to re-size and re-organise gadgets on the interactive dashboard for a fully personalised user experience
- Provides users with a company dashboard to enable users to manage key accounts better



- The Sage CRM Interactive Dashboard is an intuitive and customisable workspace from where users can manage all their daily tasks and activities for maximum productivity

## Empower Sales Teams to Sell Effectively

Generating revenue from new and existing customers is an important task for companies. Sage CRM empowers organisations to sell more effectively and efficiently. Sales executives have a single point of access for calendars, accounts, reports, pipeline management, contacts and call lists; all of which ensure that they are producing more revenue per sales hour.

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 customisable 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 as efficiently as possible.

The interactive dashboard provides at-a-glance information to sales executives and managers on performance at any point in time. Integration with back-office applications provides sales staff with access to both financial and non-financial data, for a complete 360 degree view of their customers which is displayed on the dashboard for ease of reference.

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 supports online access to the system from iPhone, Blackberry and Windows® mobile devices and has been optimised for the iPhone.

The dashboard also display feeds from websites such as news monitoring which will keep them up-to-date with published news on their business and on their competitors. Users can also link to LinkedIn® and other social networking sites to identify networking opportunities with customers and prospects.

**“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.”**

Aine O'Mahony,  
Business Development Team Leader, CarTrawler

### BENEFITS OF SAGE CRM TO THE SALES TEAM

- Improves transparency in the sales pipeline
- Offers exception monitoring/alerts
- Enables corrective action against variance earlier in the sales cycle
- Enhances sales forecast accuracy
- Enables quarterly sales performance monitoring
- Optimises sales resource against high potential opportunities
- Accelerates opportunity development
- Leads to improved win/loss ratio
- Leads to shortened sales cycles
- Increases prospect-to-customer conversion rate
- Delivers metrics on most valuable customers
- Reporting and analytics features to identify customer trends and profiles
- Enables more effective identification of new market opportunities
- Maximises cross- and up-sell opportunities
- Reduces sales training and administration costs
- Eliminates manual/duplicated sales processes
- Improves team collaboration on opportunities
- Provides seamless integration with MS Exchange server which enables field-based staff to access real-time calendar, task and contact information on any smartphone
- Decreases time spent on administrative tasks
- Improves prospect targeting
- Increases revenue yield per opportunity and account
- Leverages intelligence from back-office applications
- Boosts sales team productivity through the interactive dashboard
- Delivers a single view of relevant and comprehensive information to the sales team to maximise use of their time



- ◆ Sage CRM provides sales teams with the ability to work effectively regardless of their location via online access through the Apple iPhone



## Execute Highly Effective Marketing Campaigns Quickly and Easily

Sage CRM provides powerful tools for marketing teams to plan, execute and audit highly targeted marketing campaigns. Sage CRM allows you to develop a deep understanding of your customers' needs, enabling you to create a tailored proposition that can be communicated to them through their preferred marketing channels. Marketing campaign workflows can be easily customised so they are structured for consistent execution for maximum reach and impact. Users can clone campaigns easily 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 all from within Sage CRM.

Sage CRM Total Campaign Management allows marketing users to execute multi-channel marketing campaigns and clone winning campaigns quickly and easily. With Sage CRM, users can modify data while on a call to ensure clean data can be captured easily and leads can be rapidly converted to opportunities.

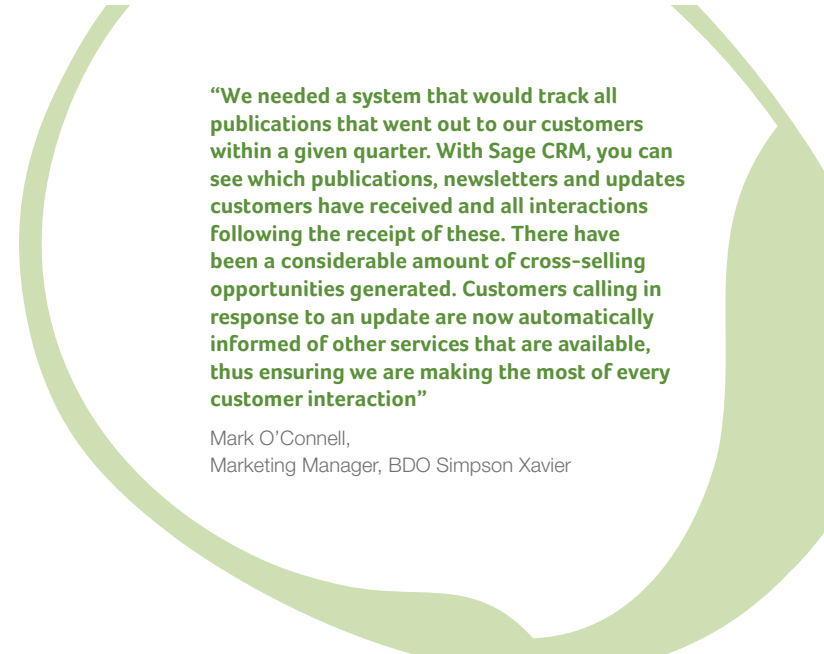
Sage CRM provides effective controls and alerts

for monitoring marketing budgets and enables you to calculate direct revenue yields per campaign. Sage CRM improves lead quality and ensures higher conversion rates by sales. The marketing team can leverage customer insights to develop retention programmes, as well as cross-sell and up-sell lifecycle management.

Marketing analytics and reporting ensure absolute accountability at all stages in the cycle, which means that ROI can be calculated with ease and the marketing budget is optimised at all times. This information can be displayed on the interactive dashboard for ease of reference.

The interactive dashboard is an intuitive workspace from which the marketing team can view and monitor marketing campaigns and activities. A pre-installed marketing dashboard is available out-of-the-box or users can customise their own dashboard with content that is relevant to them and their role.

Users can incorporate social media channels such as Twitter and LinkedIn® into Sage CRM enabling them to maximise their communications and interactions with customers and prospects.

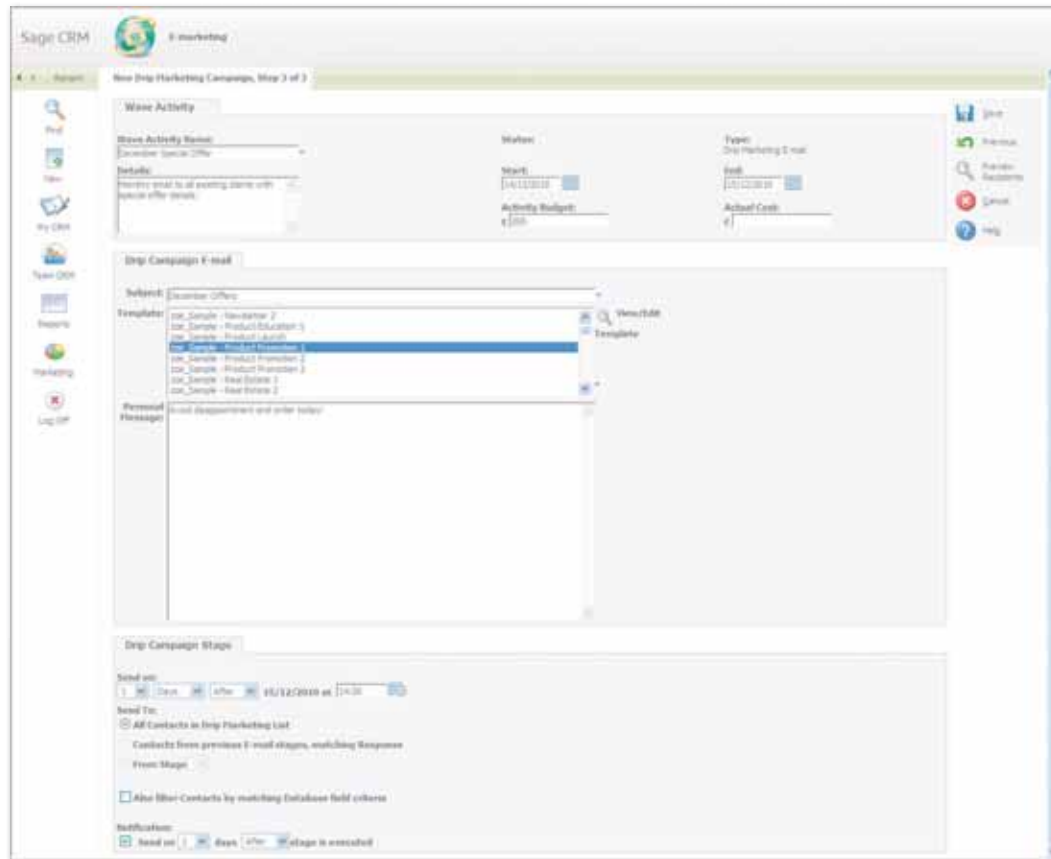


**“We needed a system that would track all publications that went out to our customers within a given quarter. With Sage CRM, you can see which publications, newsletters and updates customers have received and all interactions following the receipt of these. There have been a considerable amount of cross-selling opportunities generated. Customers calling in response to an update are now automatically informed of other services that are available, thus ensuring we are making the most of every customer interaction”**


Mark O'Connell,  
Marketing Manager, BDO Simpson Xavier

### BENEFITS OF SAGE CRM TO THE MARKETING TEAM

- Reduces marketing administrative overhead and enables marketing budget to be tracked and managed
- Enables marketing programmes 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
- Enables real-time marketing performance analysis
- Optimises marketing spend
- Enables tracking of variance against targets
- Enables 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
- Enables users to clone campaigns for department-wide collaboration
- Enables users to set up budget alerts for pinpoint budget management
- Produces open, click and bounce rate tracking for e-marketing campaigns
- Delivers a single view of relevant and comprehensive marketing information on the interactive dashboard



- Sage E-marketing for Sage CRM enables users to roll out drip marketing campaigns quickly and easily



**“With Sage CRM, 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.”**

Ann Gallagher,  
Customer Relations Manager, Avis

## Ensure Customer Satisfaction and 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 maximise the synchronisation 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, maximising 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.

Highly visual reports and graphical charts which are displayed on the interactive dashboard provide detailed analysis on metrics such as call volume, case resolution times, communications, follow-up statistics and escalation so management can quantify the performance of the agents to the business.

### BENEFITS OF SAGE CRM TO THE CUSTOMER SERVICE FUNCTION

- 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
- Increases the number of queries resolved on first contact rate
- Leads to decreased number of service escalations
- Decreases the number of customer complaints received
- Extends customer service through 24x7 self-service options
- Enables benchmarking/score carding of customer service operations on an on-going basis
- Leads to increased customer retention
- With the interactive dashboard, the customer service team can monitor customer cases from the one workspace, boosting agent productivity and maximising the efficient use of their time

Sage CRM

Find:

My CRM for: Kyle Ward

Recent | Welcome | Dashboard | Calendar | Contacts | Opportunities | Cases | Solutions | Shared Documents | Preferences | Groups

All of the Cases assigned to you are listed on this tab. The SLA status column on the left is very important when managing your workload - Red means an SLA breach, Amber is a warning, and Green is off on target.

- Use the New Case action button to create new cases, or select a Case to review its details.

36 Cases in Total

Logged (14)
Queued (0)
Investigating (9)
Waiting (1)
Solved (4)

36 Cases, Page 1 of 4

ID	Priority	Status	Subject	Assigned To	Territory	SLA
2-2	Normal	2.0	Server O'Toole	Kyle Ward	US East	Investigating
2-3	Normal	3.0	Incorrect version number	Kyle Ward	US East	Solved
2-2	Normal	1.0	Custom screen not using normal fonts	Kyle Ward	US West	Queued
2-8	Normal	1.0	Call Queue	Kyle Ward	US East	Logged
2-20021	High	2.0	Clearance Solutions	Kyle Ward	Worldwide	Investigating
2-20024	Normal	2.0	Clearance Solutions	Kyle Ward	Worldwide	Investigating
2-20027	Low	1.0	Account activation accessing tab	Kyle Ward	Worldwide	Solved
2-20044	Low	1.0	Red Screen	Kyle Ward	Worldwide	Logged
2-20045	Normal	2.0	Account O'Toole	Kyle Ward	Worldwide	Logged
2-20046	High	2.0	Account O'Toole	Kyle Ward	Worldwide	Logged

Go to page:

Status: In Progress

Stage:

Priority:

Territory:

File

New Case

Help

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

## 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.

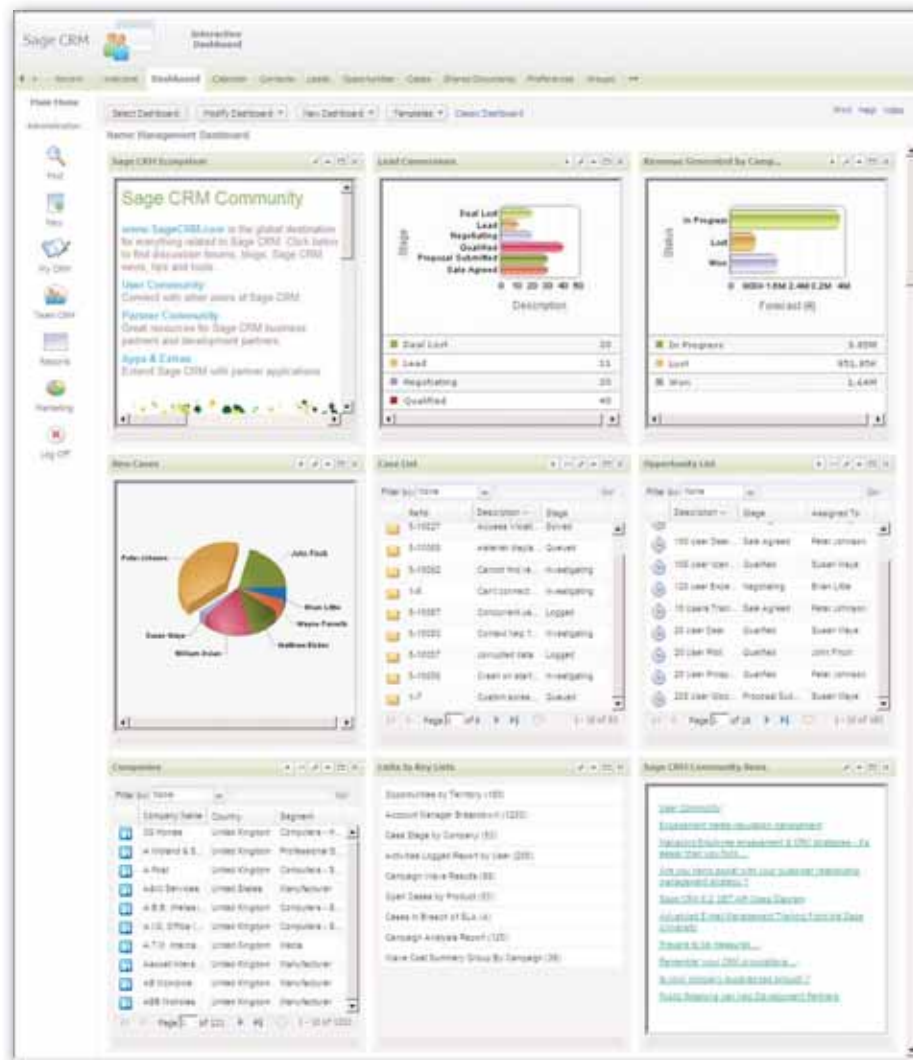
Integrated with your Sage back-office applications, Sage CRM provides a complete view of the business and streamlined end-to-end business management capabilities.

**“Sage CRM is going to allow me to continue to grow the efficiencies within the company without increasing the overhead which is very important.”**

Penelope Pearce,  
Controller, EcoWater

### BENEFITS OF SAGE CRM FOR SENIOR MANAGERS

- Drives revenue growth
- Improves profitability
- Provides improved support for strategic decision-making
- Enables real-time corporate performance management
- Drives productivity across the entire organisation
- Improves business/shareholder value
- Reduces margin erosion
- Reduces cost-of-sale
- Reduces customer attrition
- Reduces administration cost
- Eliminates process bottlenecks
- Reduces budget and performance variance
- Delivers at-a-glance business insight via the interactive dashboard



- The Sage CRM Interactive Dashboard enables management to manage business and team performance from a single workspace



## Flexible, Affordable, Scalable Solution

With Sage CRM, you have the freedom to choose a solution that best fits your unique business requirements. You can choose from flexible deployment methods (on-premise, on-demand or cloud-deployable) with confidence, knowing that Sage CRM will grow with you as your business needs evolve.

Sage offers an easy-to-use, fast-to-deploy on-premise CRM software solution with out-of-the box but configurable business process automation.

The web-based CRM infrastructure and intuitive browser interface ensure you'll be up and running – and productive – quickly without burdening your IT staff.

IT Managers can get users up and running quickly and easily thanks to the active directory import feature. Businesses can keep standard logons across their network which reduces administrative overhead and increases IT productivity.

Sage CRM offers flexible customisation options, automated process workflows, mobile solutions, web self-service and more so you

can improve productivity and empower your staff to communicate more effectively with your customers through Sage CRM.

SageCRM.com is a comprehensive on-demand CRM solution for businesses seeking a low-cost, turn-key option.

A fixed monthly price delivers everything: the CRM application, support, training, backups and updates. Data is maintained at a secure, world-class, SAS70 certified data center.

Sage CRM is fully cloud-enabled for customers who want to run Sage CRM in the cloud. This delivers the best of both worlds for customers who want all the customisation capabilities of Sage CRM with all the flexibility that the cloud has to offer.

Please contact your Sage Business Partner for full licensing and pricing details.

**“Sage CRM’s web-based architecture greatly reduces deployment and maintenance costs as we could deploy on a single server and then simply provide access through a standard web browser for all users. In addition, most of the configuration could be done using Sage CRM’s intuitive and point and click configuration tools. We knew this would have terrific time and convenience benefits for us as the implementation progressed.”**

Howard Worthington,  
Senior Manager, Database Development, Alliance & Leicester

### BENEFITS OF SAGE CRM TO IT MANAGEMENT

- Offers highly competitive total cost of ownership
- Requires minimum configuration out-of-the-box
- Lowers administration and deployment costs
- Easy to integrate with third-party applications
- Easy to integrate with on-demand services
- Offers integration with leading Sage ERP systems
- Leverages previous investments in back-office solutions and internet technologies
- Avoids “rip and replace” in the future
- Scalable solution to accommodate growth and change
- Offers flexibility to adapt to unique business processes
- Supports mobile staff
- Empowers end-users to be self-reliant around reporting requirements
- Delivers enhanced security and privacy of customer and corporate data
- Enables decreased administration associated with regulatory compliancy
- Enables IT to spend more time on strategic projects rather than day-to-day issue resolution
- Enables quick and easy batch import of users from a Windows® network with standard logons, increasing IT productivity and eliminating administrative overhead
- Administrators benefit from a single point of entry from where they can manage existing Exchange users and add new users for ease-of-administration

Sage CRM Administration -> Email and Documents -> Exchange Server Integration -> Connection Management

Exchange Server Connection User Mailbox Management

18 Records Found, Page 1 of 1

Name	First Name	Last Name	Full Name	Exchange Server Connection	Mailbox	Sync Status	Sync Date	Sync Type	Sync Interval	Sync Direction	Sync Status	Sync Date	Sync Type	Sync Interval	Sync Direction
Alan	Alan	Alan	alan@exchange.local												
Denise	Denise	Denise	denise@exchange.local												
Dev	Dev	Dev	dev@exchange.local												
Phil	Phil	Phil	phil@exchange.local												
Quinn	Quinn	Quinn	quinn@exchange.local												
Neil	Neil	Neil	neil@exchange.local												
John	John	John	john@exchange.local												
Eyle	Eyle	Eyle	eyle@exchange.local												
Heather	Heather	Heather	heather@exchange.local				2012/01/18 20								
Neil	Neil	Neil	neil@exchange.local												
Shawn	Shawn	Shawn	shawn@exchange.local												
Chad	Chad	Chad	chad@exchange.local												
Steve	Steve	Steve	steve@exchange.local												
Alan	Alan	Alan	alan@exchange.local												
System Administrator	System Administrator	System Administrator	admin@exchange.local												
De	De	De	de@exchange.local												
Traci	Traci	Traci	traci@exchange.local												
Wayne	Wayne	Wayne	wayne@exchange.local												
William	William	William	william@exchange.local				2012/01/18 20								

First Name:   
 Last Name:   
 User Name:   
 Synchronization:  Checked  Not Checked  Either

- Exchange Server integration can be created and synchronisation underway rapidly.



### About Sage CRM

Sage CRM is used by over 10,000 organisations in 70 countries worldwide to manage their critical sales, marketing and customer service activities every day. Award-winning Sage CRM equips businesses 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. Thanks to its ERP integration capabilities, the Sage CRM front-office is powered by data from the back-office to give sales, marketing, customer service and other front-office staff a true 360 degree view of customers across front- and back-office functions, differentiating it from many other CRM solutions in the market today.

Visit the Sage CRM Ecosystem at [www.sagecrm.com](http://www.sagecrm.com) to join the conversation on our user and partner communities and to access the full range of Sage CRM apps and extras.

### The Sage Difference

- The leading supplier of CRM solutions to SMB organisations worldwide
- Over 6.3 million customers
- Over 3.1 million Sage CRM Solutions users worldwide
- Over 13,400 employees
- Over 30,000 Sage-certified partners specializing in business applications
- Direct presence in 24 countries
- Relationships with over 40,000 accountancy practices
- 30 years experience

\*Source: AMR Research, 2009, The Global Enterprise Application Market