

# Sage CRM

Living breathing business



sage

# Introducing 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.

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.



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 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

## 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

## Integration Capabilities

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

# 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.

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.

“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**

## Effectively Run Marketing Campaigns

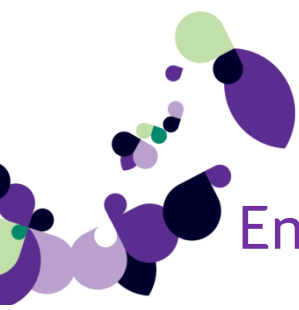
Sage CRM provides powerful tools for marketing teams to plan, execute and audit highly targeted marketing campaigns. Sage CRM allows you to develop a deep understanding of your customers' needs, enabling you to create a tailored proposition that can be communicated to them through their preferred marketing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

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.

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.



# 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

## 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.

### 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.

### About Elite Business Services

Coventry based Elite Business Services is a leading provider of CRM software solutions for companies throughout the Midlands and beyond. We are dedicated to bringing companies the solutions they truly need. Elite is an authorised Sage Business Partner, specialising in implementing their award-winning Sage CRM product.

Founded in 1996 Elite has helped hundreds of businesses make the most of the technology available to them, providing them with tailored solutions that support their businesses today and into the future. Our customers have found that they can cut costs, save time and improve profitability through our intelligent application of technology to their business. Elite is dedicated to providing a supportive environment for all customers from initial consultancy through implementation and on-going training and support.

For more information about Sage CRM and how it can benefit your business, get in contact:

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