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Sage CRM Overview

by

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Sage CRM Overview

Sage CRM provides



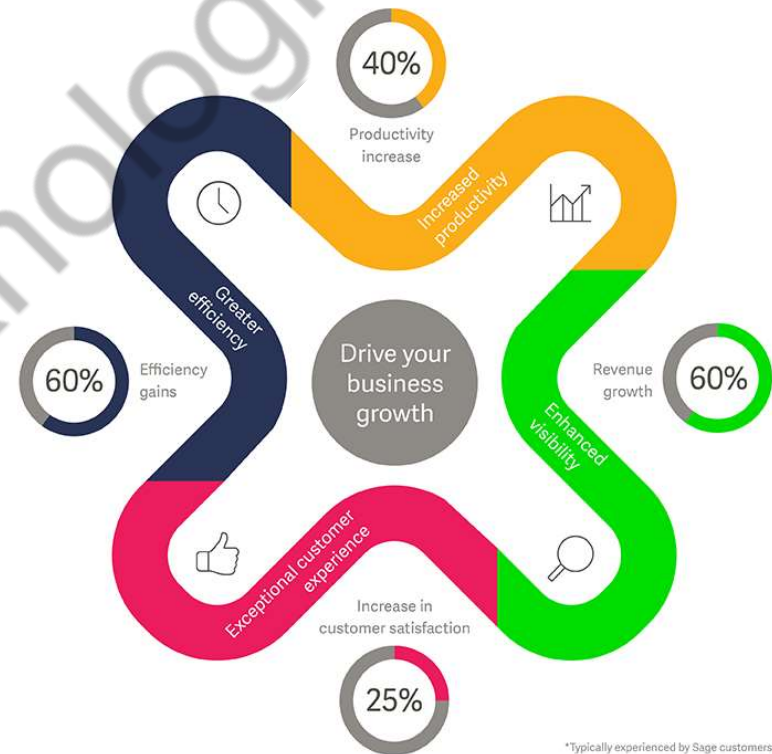
Sales, Marketing and Service modules to extend the power of your business management tools right across a business, to make informed business decisions based on accurate information at all times.



We help customers to



- Market more effectively
- Understand customers better
- Collaborate effectively across teams
- Accelerate sales team performance



To know & grow your business



Create targeted marketing campaigns

Help your marketing reach the right people

Accelerate and focus your sales activities

Work on the most profitable activities

Provide an excellent customer experience

Delight customers and outperform the competition

Harness the power of an integrated CRM

Automate processes within your business to do more

Sage CRM Customer Segments and Insights

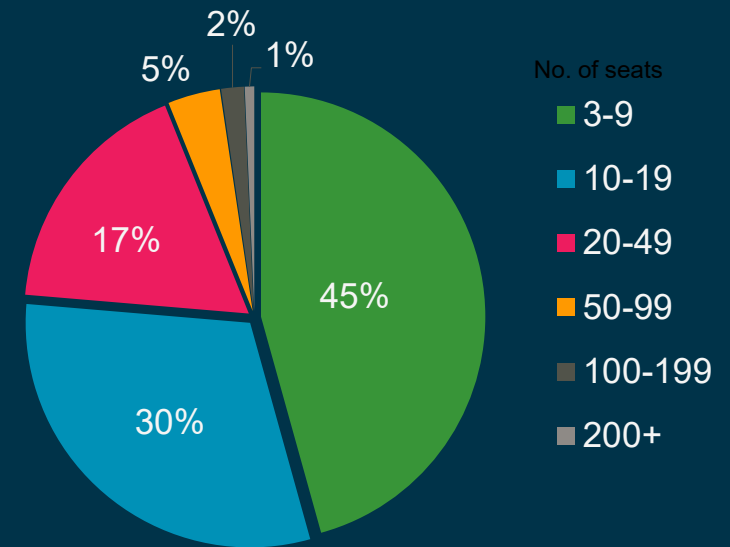
Typical Sage CRM customers



- Operate in almost every industry
- The majority (~75%) have 20 or fewer users
- In marketing, sales, service & operational roles
- More than 17 000+ customers across the globe



Sage CRM customer breakdown by seat size and % of customer base*



*All Sage CRM licenses since 1/1/13

Typical customer needs



Organising data	Tracking Sales	Delivering service	Better visibility
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42% of Sage BMS users indicated their lack of communication between teams and across different departments

18% of respondents think that they need the most improvement in managing their quotes and orders

61% of respondents indicated their inability to track and manage sales opportunities and leads effectively.

30% of respondents indicated their missed sales opportunities.

19% of respondents think that they need the most improvement in managing customer service *(planning, tracking & customer communication)*

29% of respondents indicated their lack of insight across the entire business (KPI's).



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Sage CRM Features

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Sage CRM for Marketing /1



Our marketing features enable you to:

- Plan marketing campaigns and track the results

The screenshot displays the Sage CRM interface. At the top, there is a navigation bar with 'sage CRM' logo, 'My CRM', 'Team CRM', and 'Reports' dropdowns, along with a search bar and user profile icons. Below this is a secondary navigation bar with 'Dashboard', 'Calendar', 'Contacts', 'Leads', 'Opportunities', 'Forecasts', 'Cases', 'Shared Documents', and 'Preferences'. The main content area shows a 'Find:' search bar and 'My CRM for: John Finch' dropdown. A green banner provides instructions on using the calendar for appointments and tasks. Below this is a date range selector for 'Friday, September 08, 2017 - Wednesday, December 13, 2017' and view options: 'Day', 'Work Week', 'Week', 'Month', 'Agenda', and 'Tasks'. A 'Quick Task' section includes an 'Add' button, an 'Action' dropdown, a 'Pending' dropdown, a 'Show Overdue Tasks' checkbox, and a 'Drop files here' area. The main table lists tasks with columns for Date, Time, Event, Person, Company, Action, Status, and Complete.

Date	Time	Event	Person	Company	Action	Status	Complete
01 Friday December, 2017	4:00 PM	✓ Check in with Susan - forecast			To Do	Pending	<input type="checkbox"/>
04 Monday December, 2017	10:00 AM	✓ Set up lunch with Eurolandia	Kieran O'Toole	Eurolandia	To Do	Pending	<input type="checkbox"/>
08 Friday December, 2017	11:00 AM	✓ Prepare presentation	Daniel Padden	American Gage	To Do	Pending	<input type="checkbox"/>
13 Wednesday December, 2017	8:00 AM	✓ Submit Expenses			To Do	Pending	<input type="checkbox"/>

Sage CRM for Marketing /2



Our marketing features enable you to:

- Plan marketing campaigns and track the results
- Manage a marketing campaign across multiple channels

The screenshot shows the Sage CRM interface for a contact named George Revell. The 'Marketing' tab is active, displaying various marketing-related details. The 'Marketing Information' section includes fields for CRM Solution Implemented (Yes), IT Budget (<\$1M), Current Supplier (3G Homes), Preferred Database, and Current Supplier Description. Below this, a table titled 'MailChimp Campaign Results for Current Person' shows two campaigns: 'Boston Conference - Email 1' and 'Boston Conference - Mail 1 Clicked Interested'.

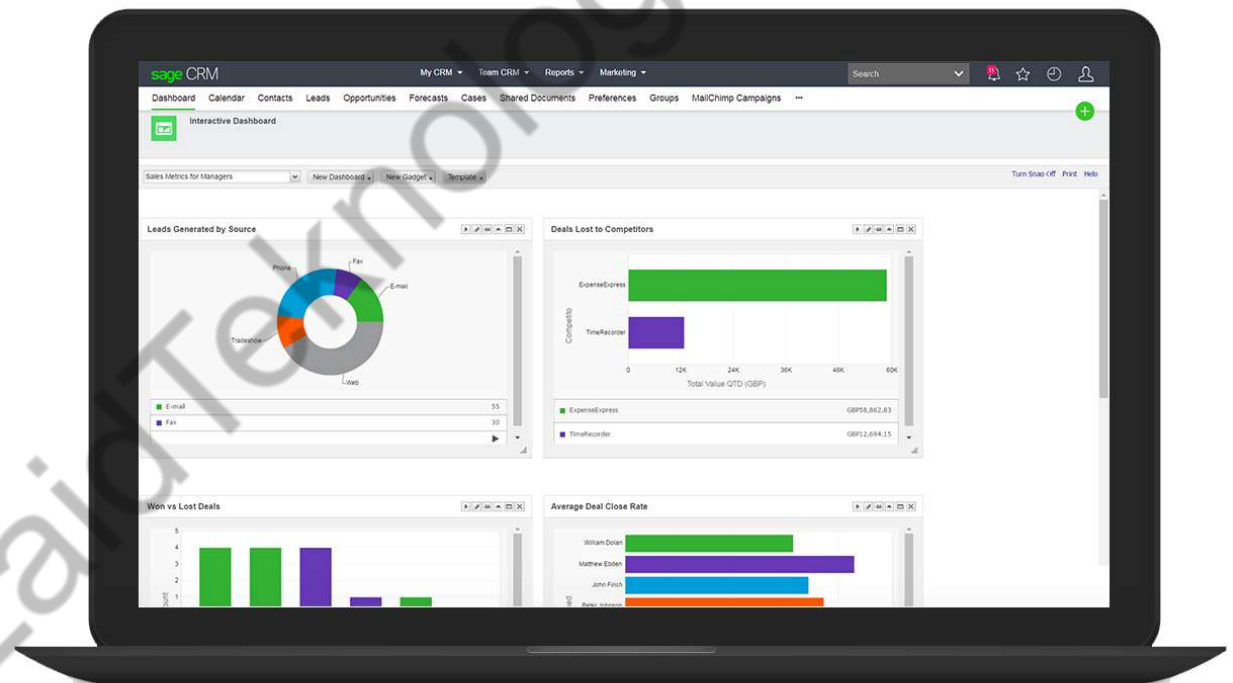
Campaign Name	Group	Status	Email Open Count	Clicked Urls
Boston Conference - Email 1	US East Contacts	Sent	2	1
Boston Conference - Mail 1 Clicked Interested	Boston Conference - Clicked In Mail 1	Sent	1	2

Sage CRM for Marketing /3



Our marketing features enable you to:

- Plan marketing campaigns and track the results
- Manage a marketing campaign across multiple channels
- Track new leads and sales opportunities

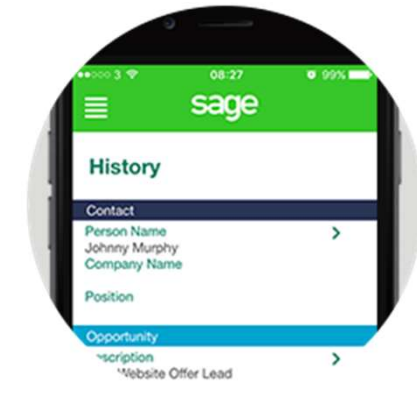
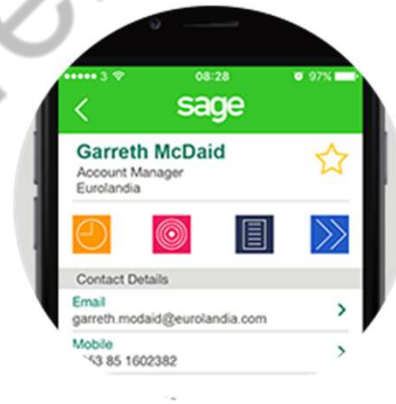


Sage CRM for Sales /1



Our sales features enable you to:

- Prepare for important sales meetings by accessing important customer data 'on the go'

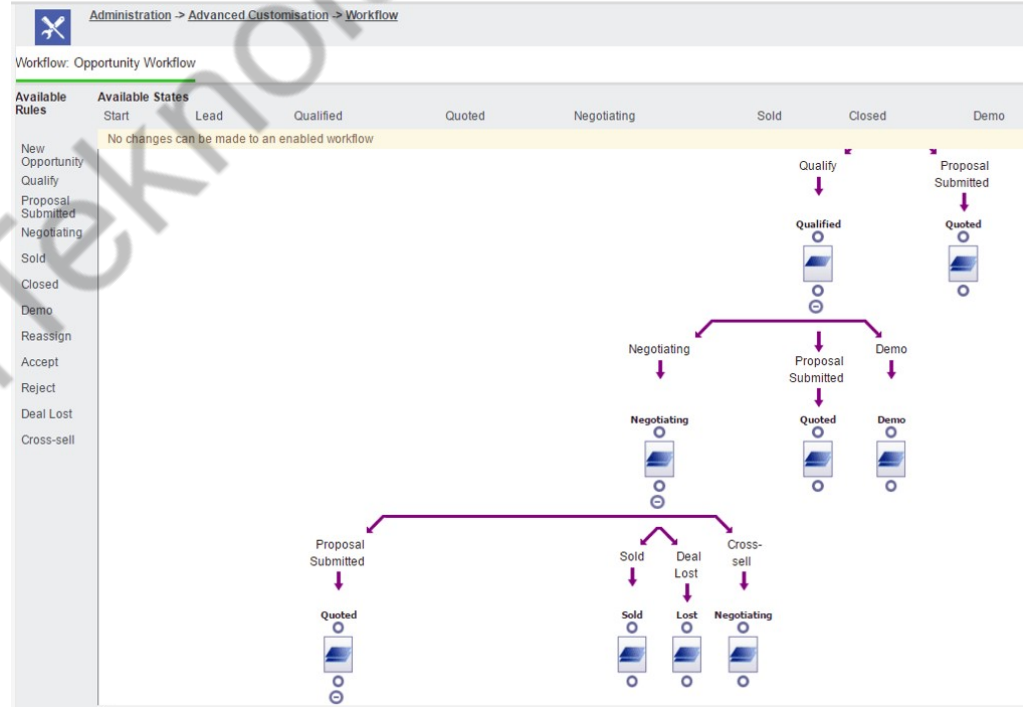


Sage CRM for Sales ¹²



Our sales features enable you to:

- Prepare for important sales meetings by accessing important customer data 'on the go'
- Follow compliance and 'best practice' routines using integrated workflow.



Sage CRM for Sales ¹³



Our sales features enable you to:

- Prepare for important sales meetings by accessing important customer data 'on the go'
- Follow compliance and 'best practice' routines using integrated workflow.
- Track the performance of your sales teams using out-of-the-box sales reports

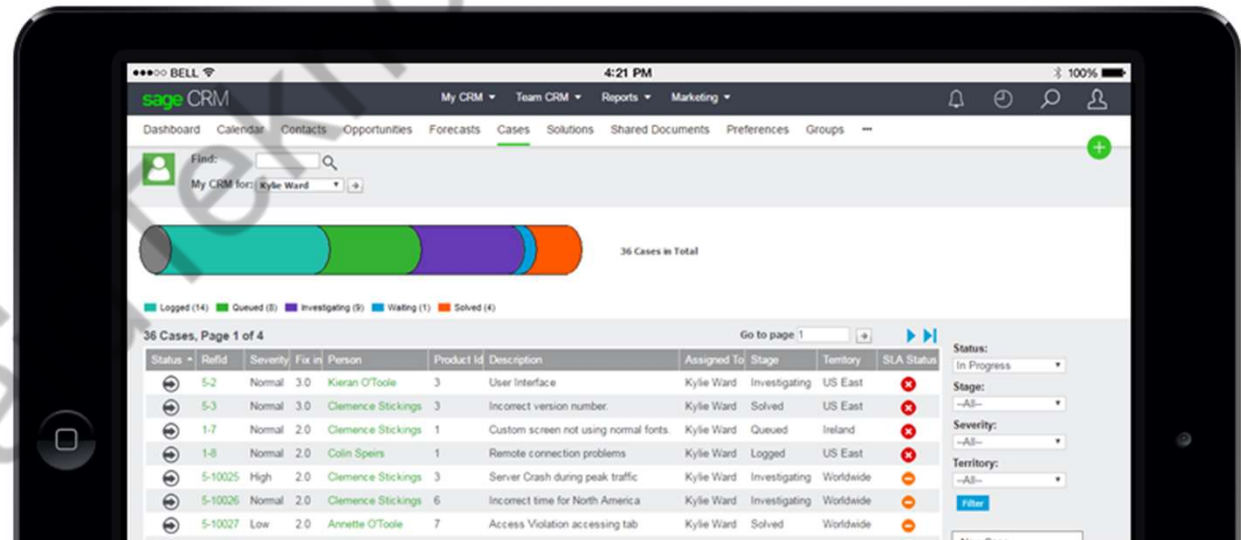


Sage CRM for Service /1



Our service features enable you to:

- Automate and manage customer service cases, helping resolve cases faster



Sage CRM for Service 1/2



Our service features enable you to:

- Automate and manage customer service cases, helping resolve cases faster
- Manage service teams & assignments

The screenshot displays the Sage CRM interface for a case titled '5-2: User Interface'. The case is assigned to Kieran O'Toole and is currently in the 'Investigating' stage. The interface includes a navigation menu, a search bar, and a sidebar with various actions like 'Change', 'Continue', 'Next', 'Summary Report', 'Add to Group', and 'Help'. The main content area shows the case details, including the refid, SLA, person, severity, and stage. It also features a 'Case Notes' section with a table of updates and a 'Case Tracking' section with a table of case history.

Refid	SLA	Person	Severity	Stage	Area	SLA Severity	Company Name	Assigned To	Status
5-2	Gold	Kieran O'Toole	Normal	Investigating	Install	Medium	Eurolandia	Kyle Ward	In Progress

Company	Person	Date	Last Update	Last Modified	Date	User
Eurolandia	Kieran O'Toole	27/02/2018 12:34	Kyle Ward	27/02/2018 12:34	I've been able to remote into Kieran's machine. I have confirmed the problem. I have been able to reproduce the issue. The exact steps to reproduce are pretty complex. I don't think this will affect other users.	Kyle Ward
Eurolandia	Kieran O'Toole	27/02/2018 12:35	Kyle Ward	27/02/2018 12:35	I am going to escalate this to Dev as I can't see a work around.	Kyle Ward

Case	Created On	Created By	Stage	Tracking Note	Remaining
In Progress	13/02/2018 12:28	System Administrator	Investigating		7 Days(10 Hours) 41 Minutes
In Progress	13/02/2018 12:28	Kyle Ward	Investigating		20 Days(8 Hours) 13 Minutes
In Progress	13/02/2018 12:28	Kyle Ward	Investigating	Installation log indicated file was installed. A unique distion perhaps?	122 Days(17 Hours) 28 Minutes
In Progress	13/02/2018 12:28	Kyle Ward	Logged		8 Hours(34 Minutes)

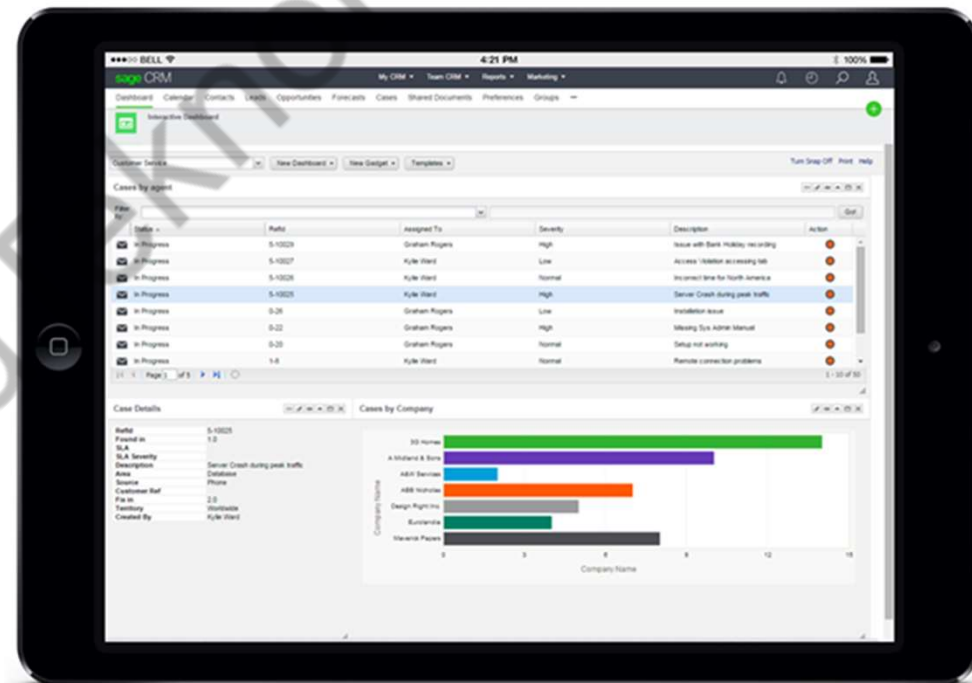
Date/Time	Action	Person	Subject	Details	User	Priority	Status
				Missing file. Send Engineer to install file and investigate its deletion.			

Sage CRM for Service ¹³



Our service features enable you to:

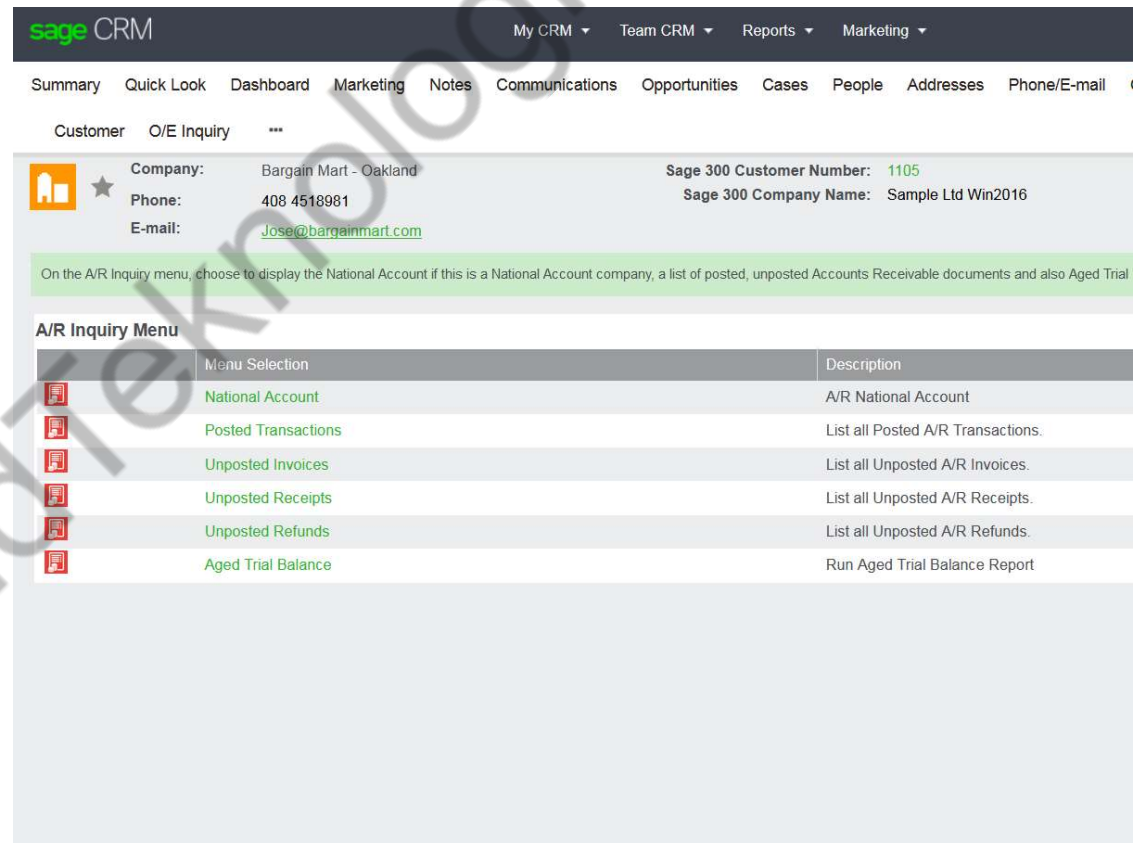
- Automate and manage customer service cases, helping resolve cases faster
- Manage service teams & assignments
- Report on critical customer service metrics quickly and easily









Integrated Sage CRM for your accounting system /1

Our integration features enable you to:

- Organize and consolidate accounts information into one reliable source



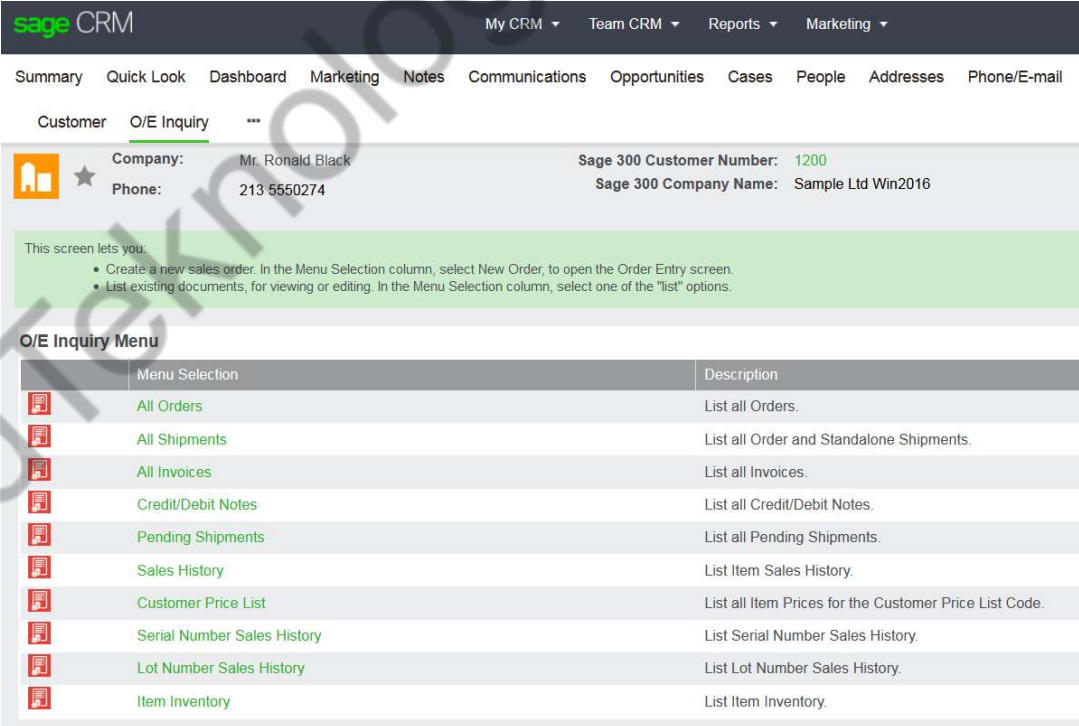
The screenshot displays the Sage CRM interface for a customer profile. The top navigation bar includes 'My CRM', 'Team CRM', 'Reports', and 'Marketing'. Below this, a secondary menu lists 'Summary', 'Quick Look', 'Dashboard', 'Marketing', 'Notes', 'Communications', 'Opportunities', 'Cases', 'People', 'Addresses', and 'Phone/E-mail'. The main content area shows customer details for 'Bargain Mart - Oakland' with contact information and Sage 300 identifiers. A green banner provides a note about the A/R Inquiry menu. Below this is the 'A/R Inquiry Menu' table.

Menu Selection	Description
 National Account	A/R National Account
 Posted Transactions	List all Posted A/R Transactions.
 Unposted Invoices	List all Unposted A/R Invoices.
 Unposted Receipts	List all Unposted A/R Receipts.
 Unposted Refunds	List all Unposted A/R Refunds.
 Aged Trial Balance	Run Aged Trial Balance Report

Integrated Sage CRM for your accounting system ¹²

Our integration features enable you to:

- Organize and consolidate accounts information into one reliable source
- Easily see payment history, order status, customer cases, quotes, orders, shipments and more



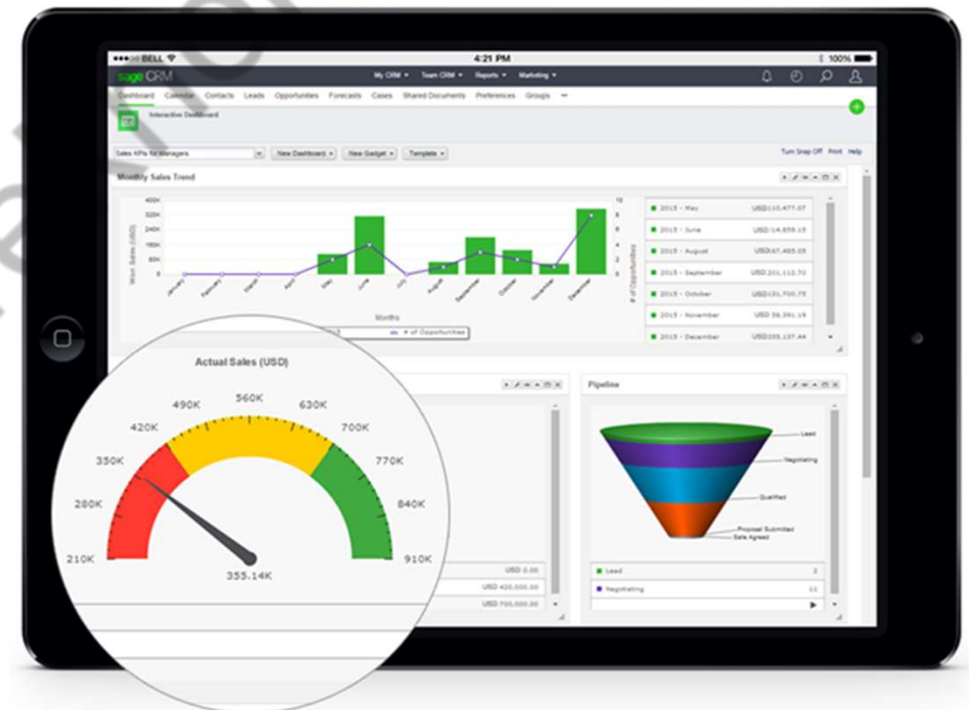
The screenshot displays the Sage CRM interface for an O/E Inquiry. The top navigation bar includes 'sage CRM' and dropdown menus for 'My CRM', 'Team CRM', 'Reports', and 'Marketing'. Below this is a secondary navigation bar with links for 'Summary', 'Quick Look', 'Dashboard', 'Marketing', 'Notes', 'Communications', 'Opportunities', 'Cases', 'People', 'Addresses', and 'Phone/E-mail'. The main content area shows the 'Customer' tab selected, with 'O/E Inquiry' as the active sub-tab. Customer details for 'Mr. Ronald Black' are displayed, including the phone number '213 5550274'. Sage 300 specific information shows 'Customer Number: 1200' and 'Company Name: Sample Ltd Win2016'. A green instruction box states: 'This screen lets you: • Create a new sales order. In the Menu Selection column, select New Order, to open the Order Entry screen. • List existing documents, for viewing or editing. In the Menu Selection column, select one of the "list" options.' Below this is the 'O/E Inquiry Menu' table.

Menu Selection	Description
All Orders	List all Orders.
All Shipments	List all Order and Standalone Shipments.
All Invoices	List all Invoices.
Credit/Debit Notes	List all Credit/Debit Notes.
Pending Shipments	List all Pending Shipments.
Sales History	List Item Sales History.
Customer Price List	List all Item Prices for the Customer Price List Code.
Serial Number Sales History	List Serial Number Sales History.
Lot Number Sales History	List Lot Number Sales History.
Item Inventory	List Item Inventory.

Integrated Sage CRM for your accounting system ¹³ **sage**

Our integration features enable you to:

- Organize and consolidate accounts information into one reliable source
- Easily see payment history, order status, customer cases, quotes, orders, shipments and more
- Better manage supplier information such as purchase orders, payments and call history



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The Sage CRM message

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The story about Sage CRM



Designed for small and enterprise sized businesses, Sage CRM is easy to use & manage so you can focus on your business, not on software.

Quick to deploy, easy to use & low cost

- *Browser delivered, easy to use 'from the box' and quick to configure to match company, team & user requirements.*
- *It can be optimized to an individual business, with unlimited fields, screens, reports, connections and much more.*

Strength in configuration

- *An easily configured workflow offers many options to suit the processes/process flows within a company.*
- *Each user can personalize their experience so that the most pertinent information is shown*

Visibility

- *Through integration with Sage ERP solutions (Sage 100 ERP, Sage 300 ERP and other Sage accounting products), it can provide end-to-end visibility across an entire business*

Respond to changing customer requirements

- *A simple data & process management tools to manage customer relationships – now & in the future.*
- *Enable the business to scale for growth and become more agile to compete effectively*

The story about your company



Have you realised the magnitude of your challenges?



When asked about their company's top 3 current business challenges that are prompting them to consider a CRM system:

- 61% of respondents indicated an inability to track & manage opportunities effectively.
- 42% of respondents indicated lack of communication between teams & departments.
- 30% of respondents indicated their missed sales opportunities.
- 29% of respondents indicated a lack of management insight across the entire business

The solution may be more manageable than you first thought



Many companies believe they need to be a big company to use a CRM solution.

Today, CRM solutions are leveraged to by companies of all sizes and as few as 10 employees. Sage CRM is quick and easy to deploy so you can be up and running in days. We offer in-product guidance, online and classroom based learning + support to ensure all our customers can easily access help and assistance when they need it.

The cost effective, flexible proposition that is Sage CRM



It is easy to use & adapt to how your business works - both now and in the future. It is easy to install, manage & maintain so you can focus on business, not on software. When combined connected with Sage ERP, you can enjoy better business insight, greater efficiencies, increased productivity and a single, customer-centric view across your entire business

Sage CRM – for everyone, everywhere

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Thank you

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