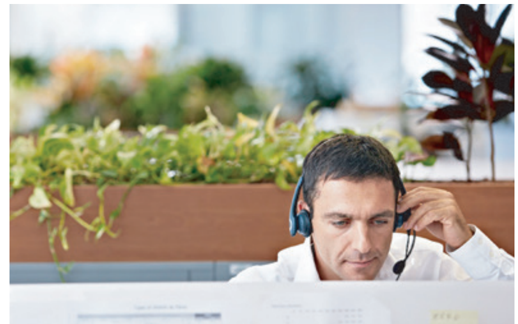
Sage CRM

Vision33

Exceptional customer service



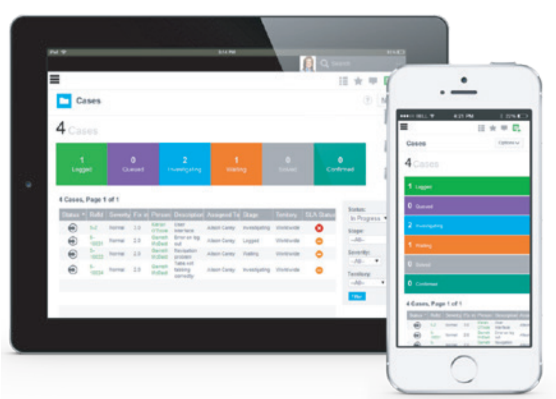
Deliver fast, efficient customer service

Winning a new customer is only the beginning of what should be a long and profitable relationship. But keeping customers happy means ensuring they get what they want, when they want it. From defining processes to tracking cases and solutions, you can resolve customer issues effortlessly.

Sage CRM is designed to help you manage and resolve customer inquiries and issues efficiently and effectively, by accessing real-time customer information when you need it.

Your customer service staff gains full access to every customer communication, so you can make every interaction informative and effective.

Also, when you choose to integrate Sage CRM with a Sage ERP system, your entire business benefits from end-to-end visibility and a single view of the customer, where each department works with the same information and communicates in the same way. This centralized data can be displayed directly on an interactive dashboard for convenient and quick views into the health of your customer service performance.



Customer inquiries can be monitored in real time to ensure that SLAs are reached.

Benefits snapshot

- Manages your customer accounts with insight and collaboration
- Responds to customer cases quickly, reducing response times to customer service requests
- Enables agents to quickly and accurately find the right answer the first time
- Enables customer satisfaction measurement and benchmarking
- Increases productivity of customer support representatives
- Provides self-service facility to customers around common issues
- Enables customer issues to be tracked and responded to, regardless of who answers the phone or receives the email
- Monitors service performance against service-level agreements
- Reduces customer support costs and cost of customer retention
- Decreases the number of customer complaints received and increases customer retention
- Enables benchmarking/scorecarding of customer service operations on an ongoing basis
- Delivers a single view of relevant and comprehensive information on the interactive dashboard

"We can resolve issues in one call, get off the phone, and get on to the next knowing that all the history is waiting for you."

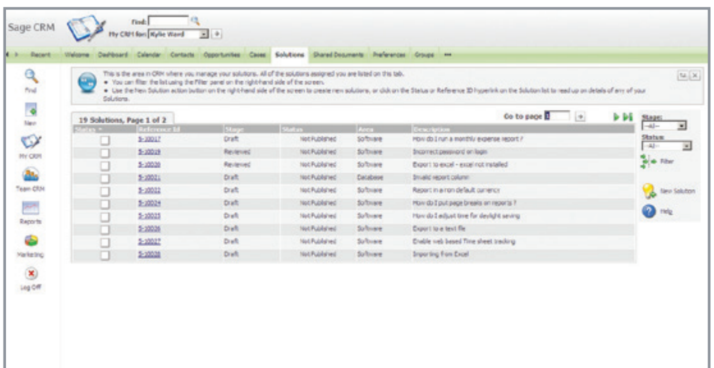
Jay Lentz
Client Development Executive, Lincoln Waste Solutions, Connecticut

Case management

Sage CRM provides your customer service team with the ability to record customer inquiries/incidents that need to be followed up on. If a case is not followed up on within the time allocated, it will automatically trigger an escalation procedure to inform your customer service manager. This ensures that customer cases are attended to in a timely manner and that issues do not get lost "between the cracks." Cases can be tracked and actioned directly from the interactive dashboard without the need to switch between screens, maximizing the productivity of agents.

Knowledgebase

Sage CRM provides central knowledgebase capabilities for technical solutions to known issues or questions. This provides agents with easy and immediate access to a central bank of information and keeps accurate records of contacts with customers through case tracking and communication logs.



Sage CRM gives customer service agents predefined screens and views that they can access when trying to resolve a customer service issue.

Customer service staff can find a solution to a customer inquiry quickly and easily, which ultimately results in improved customer care. A full workflow approval process ensures that only solutions that have been reviewed and approved by the relevant manager are published in the knowledgebase.

Workflow

The ability to define customer care processes and escalation points is controlled and managed by a feature in Sage CRM called workflow. If a customer service case or inquiry remains unresolved for longer than the predefined time, the workflow process triggers an automatic escalation notification to the customer care manager.

This alert is a powerful automatic reminder that ensures each case is followed up on. Workflow can be fully configured in order to ensure that cases are progressed in accordance with company-specific requirements.

Reporting

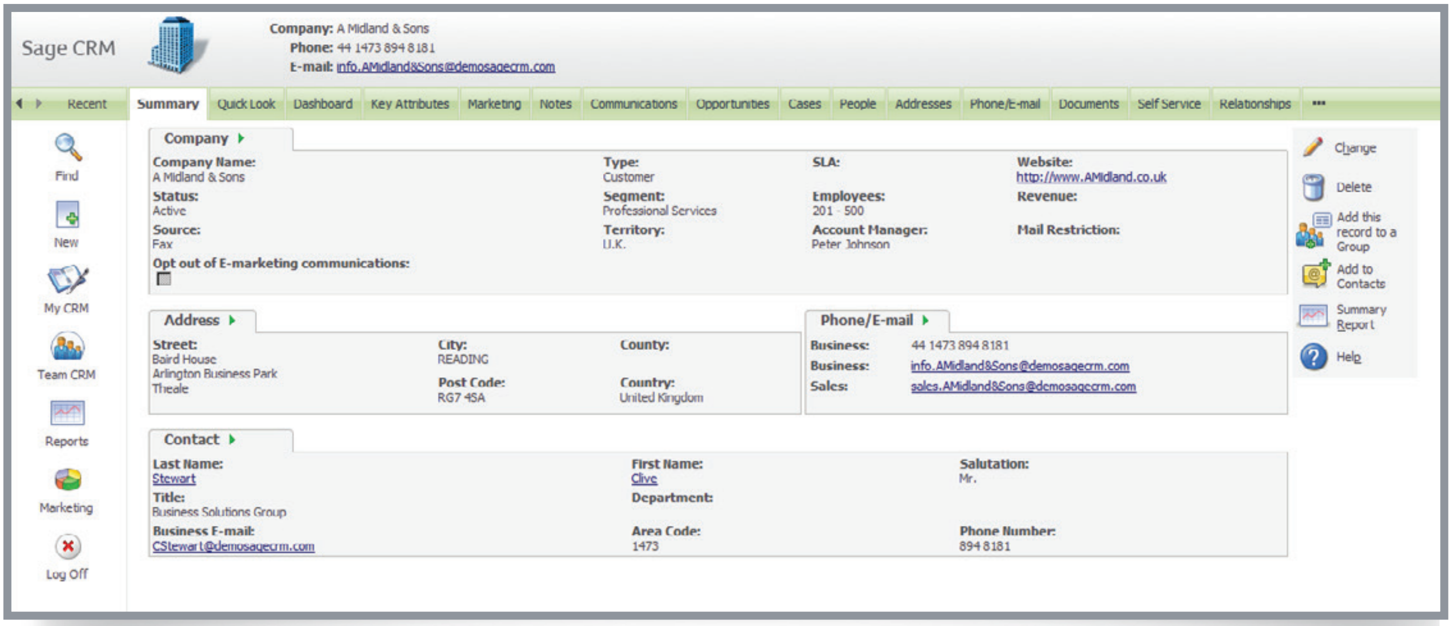
Sage CRM provides powerful reporting capabilities, which make it easy to monitor and measure customer service performance. Reports and dashboards provide overview information and detailed analysis on metrics such as call volume, case resolution times, communications, and follow-up statistics.

Customers can be provided with customized reports to demonstrate that the resolution criteria within their SLAs are being met. These can be displayed on the interactive dashboard for quick and easy access and analysis.

Report charts are highly visual and can be incorporated into presentations for a professional look and feel. Charts are completely customizable, so users can modify the charts to suit their specific needs.

"We believe that we're now one of the leaders in the industry in providing critical information to clients, instantly accessible whenever they want it. This helps us to win new business and enhance our service to existing clients."

Simon Adcock
Managing Director,
ATEC Security Limited



Sage CRM maximizes customer satisfaction and drives customer loyalty by equipping agents with comprehensive, real-time information on the customer and their account.

Team management

Sage CRM ensures your management team have access to key company information so they can assess important metrics. These include information such as case volume and the case resolution times, as well as qualitative metrics such as the prioritization of cases and overall customer satisfaction. This means that staff are motivated and fully equipped to resolve customer issues and customers receive a more meaningful and personalized service.

Web self-service

Sage CRM offers a web self-service module that enables businesses to allow their customers, partners, and suppliers to access a subset of their Sage CRM data and functionality over the web at their convenience. This capability can be fully integrated within the company's own website, ensuring that their customers benefit from an entirely seamless experience.

ERP integration

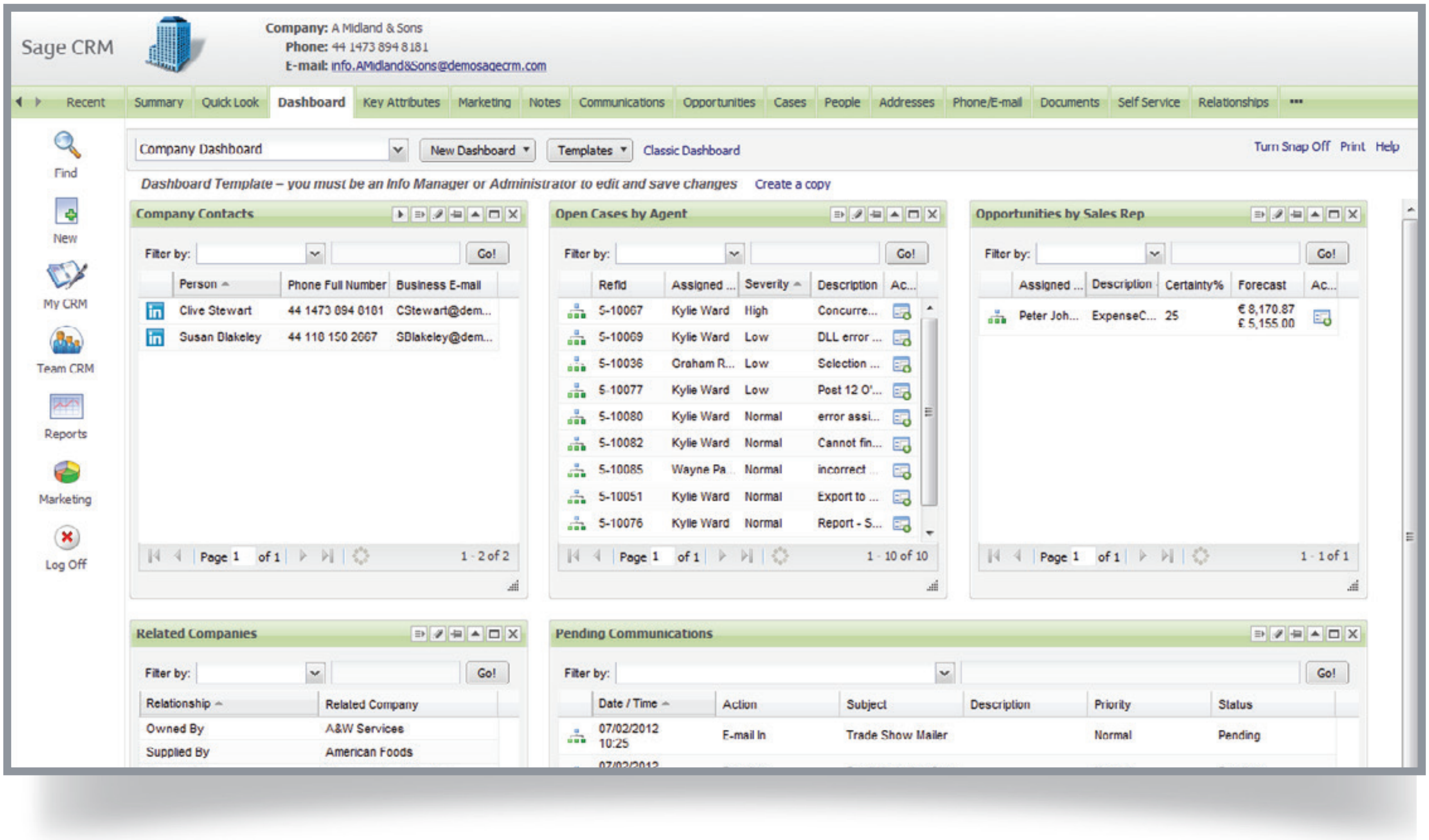
By integrating your CRM and ERP systems together you provide your customer service teams with a multidimensional view of customers that makes it easier to deal with queries and complaints.

For example by being able to match a complaint to an order and invoice in ERP, customer service can initiate a more timely response and quicker resolution, reducing the risk of long-term damage to the customer relationship. Valuable customers can be identified, and, if needed, referred back to sales to further nurture the relationship.

Information from your Sage ERP solution can be displayed on the interactive dashboard for quick and easy access, equipping the customer service team with powerful information to provide customers with a consistent and exceptional service.

"Previously, incoming customer inquiries could only be dealt with by looking through disconnected spreadsheets, documents, and billing software. Now it's all on one screen, which makes our people much more productive."

Jay Lentz
Client Development Executive, Lincoln Waste Solutions



Sage CRM allows your team to see and manage all customer interactions from an intuitive dashboard.

The interactive dashboard

Users can view communications, contacts, leads, opportunities, or cases all through the interactive dashboard. This ensures that customer service teams are equipped with the most accurate and up-to-date information at their fingertips regardless of where it is located within Sage CRM, enabling them to provide a consistent and excellent customer service at all times.

The dashboard can be configured to display the relevant information you need, including optional feeds from a Sage ERP solution or from a customer self-service portal.
Users can choose to use the preinstalled customer service dashboard available out of the box or configure their own dashboard or team dashboard to create a workspace that reflects the unique needs and terminology of the business.

Users can also create a company dashboard for specific key accounts to enable them to better serve their customers. With the interactive dashboard, the customer service team can monitor customer cases from the one workspace, boosting agent productivity and maximizing
the efficient use of their time.

“Sage CRM helps us add value by keeping us close to our customers and building loyalty.”

Steen Teisen
CEO,
Widex, China

Vision33

210 Water Street
Suite 400
St. John’s, NL A1C 1A9

contact@vision33.com

www.vision33.ca

About Vision33
Vision33 Inc. is a global IT professional services consultancy that solves customer business challenges through the promise of technology and the value it delivers. We partner with growing and large organizations in both the public and private sectors to understand their vision and help them reach it with the right blend of strategy, consulting, and technology. Vision33’s global team of results-driven resources provide world-class experience through our office locations in North America and Europe. For more information about Vision33, visit: www.vision33.ca.

Vision33