Sage CRM

Vision33

# Focused sales management

## Make the most of every sales opportunity

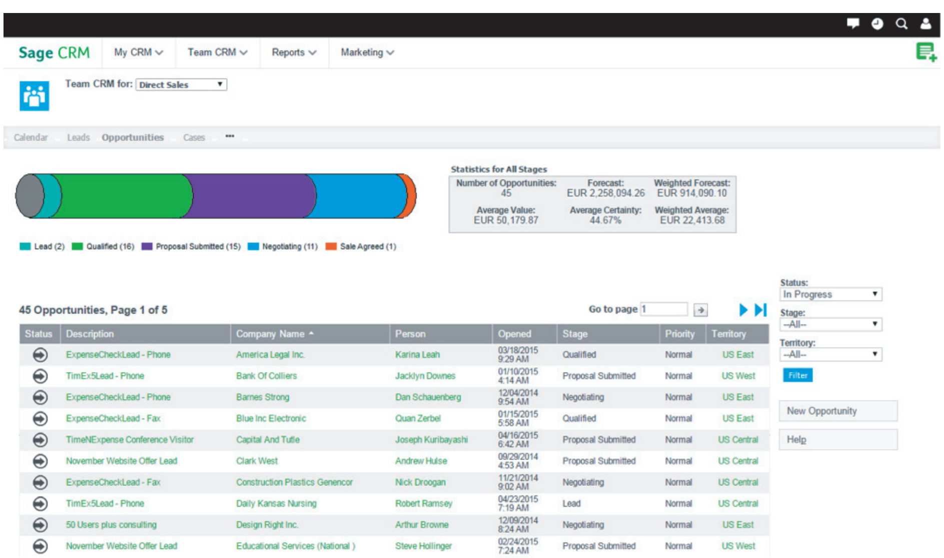
Sage CRM directs your sales efforts toward the most profitable, most winnable deals and helps you make the most of cross-selling and upselling opportunities. With instant access to pipelines, calendars, sales reports, contacts, and much more, your salespeople are freed up to focus all their efforts on selling.

Automated workflow and pipeline management enable sales opportunities to be progressed quickly and efficiently, while data is effectively shared with and accessed by anyone who needs it.

Providing an end-to-end view of every opportunity from within one, easy-to-use screen, Sage CRM ensures your team have full visibility of what is happening with every prospect and customer. This helps simplify forecasting and strengthens pipeline management.

When you choose to also integrate Sage CRM with a Sage ERP solution, your salespeople get a full view to the customer information they need, when they need it. For example, they can access the current pricing, inventory, and customer status information they need, all through Sage CRM.

With Sage CRM sales force automation, real-time sales opportunity analysis is provided instantly. Sage CRM provides a snapshot of all opportunities within the sales pipeline, allowing sales teams to effectively analyze and manage deals at every stage.




With Sage CRM, opportunities can be tracked in real time and assigned to members of the sales team.

## Benefits snapshot

- Maximize the value of each and every sales opportunity in your pipeline.
- Create accurate quotes and orders in a couple of clicks.
- Manage collaboration and team selling across your department with ease.
- Eliminate guesswork; make decisions based on accurate, real-time information
- Empower your team and boost productivity with a single view of leads, opportunities, tasks, and activities.
- Improve consistency across the sales organization with access to sales performance reports.
- Maximize cross and upsell opportunities.
- Leverage financial information from your Sage ERP solution.
- Reduce time spent in the office on sales administration (more time on sales calls).
- Enable sales teams to work effectively regardless of their location with Sage CRM mobile solutions.
- Create improved team collaboration and customer communications by using integrated LinkedIn, Facebook, and Yammer.

"At one end, tracking sales has been phenomenal. At the other, we're getting a much better handle of how we spend our dollars and a better feel for what's coming down the pipeline."

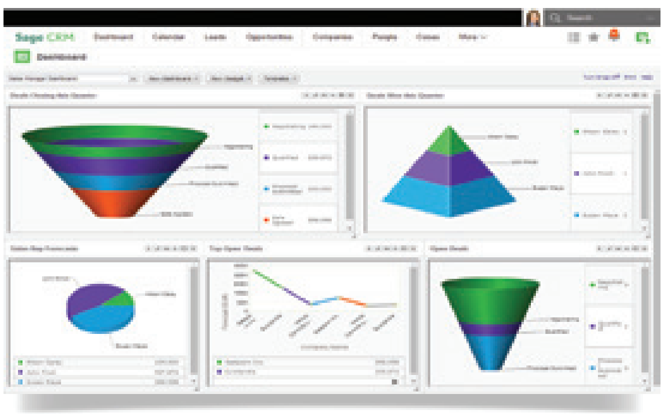
**Dennis LeVan**
IT Manager,
Thermo-Twin Industries,
Oakmont, PA

## The interactive dashboard

Sales teams work more efficiently thanks to the interactive dashboard. This is an intuitive and customizable workspace from which they can manage all their daily tasks and activities for maximum productivity.

A preinstalled sales dashboard is available out of the box, or users can customize their own dashboard or team dashboard with content that is relevant to them and their role.

The sales team can monitor their opportunities and pipeline, manage their calendar and appointments, and identify powerful networking opportunities from social media channels, all from this customizable workspace. This removes the need for users to switch between screens, maximizing the efficient use of their time and boosting productivity.



The interactive dashboard provides the sales team with an intuitive and customizable workspace from which they can better serve their customers and key accounts.

## Management of opportunities and leads

Using Sage CRM, salespeople can track leads from lead capture to close. This ensures that time and resources are invested into the deals that are most likely to close and enables the sales team to easily identify and recruit new customers and resell or upsell to existing accounts.

With Sage CRM, leads can be escalated and reassigned easily from the interactive dashboard. Follow-up activities can be automated, and field-level security is a simple and straightforward process. It also guarantees that leads are handled by the salespeople most qualified to assist the client, and only relevant parties are privy to information.

Sage CRM permits sales reps and managers to effectively analyze and manage the sales pipeline, with the ability to see and report on leads, opportunities, and proposals at a glance.

## Sales forecasting and reporting

Sage CRM provides point-and-click reporting and graphs along with accurate and timely forecasts, which are accessible by the sales team. This enables easy sales forecasting and reporting and provides sales teams and management access to data for immediate analysis and decision making.

Sales teams can also access detailed business insight data as well as graphical interpretations on the state of the business at any moment in time, allowing businesses to strategically plan and gain insights on future performance.

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

## Quotes and order generation

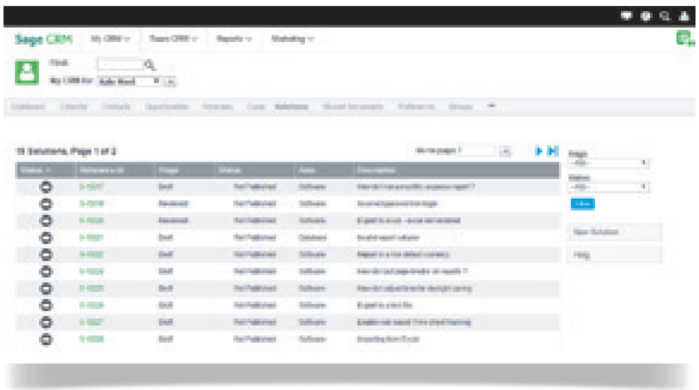
With Sage CRM, the most up-to-date quotes are delivered with access to the latest product information. This maximizes efficiency, reduces the margin for error, and makes communications with customers and prospects more professional. Sage CRM has functionality to automatically generate sales proposals and quotes using predefined templates, enabling users to generate compelling, comprehensive, and accurate proposals quickly and efficiently.

"Sage CRM drives efficiency, which is the same as profitability for a business like ours. Information is king. It gives us a level of reporting and a snapshot of each aspect of the business with a level of detail we didn't have before."

**Jay Lentz**
Client Development Executive,
Lincoln Waste Solutions

## Territory management

With Sage CRM, assignment rules automatically route leads to the relevant salespeople based on territories. It is possible to create new teams and reassign ownership of teams as well as view marketing campaigns, response rates, and associated sales revenue by territory.



Sage CRM provides sales executives with a complete diary solution, allowing the sales team to effectively keep track of client visits, pipeline meetings, and routine tasks.

## Sales process automation

In Sage CRM, the sales process is automated to enable salespeople to concentrate on their primary purpose, which is selling. The built-in workflow can be followed out of the box or customized to reflect your business process. The automation in Sage CRM means that all sales users follow the same steps, ensuring no opportunities "fall through the cracks." The sales process can be structured to suit your internal business process for maximum effectiveness.

Sage CRM also delivers periodic messages to sales managers, summarizing critical opportunity and forecast information for their direct reports. This ensures business opportunities are always retained and worked on.

## Communications management

Sage CRM provides sales teams with a complete diary solution with daily, weekly, monthly, and yearly views. In addition, onscreen reminders and notification alerts are available to all sales team members, increasing efficiency, punctuality, and convenience.

This synchronization of information fosters organizational transparency within the business and enhances the quality and retention of information available to the user. The calendar can be managed from the interactive dashboard, ensuring that appointments and tasks are managed with ease.

## ERP integration

When businesses combine CRM and ERP, sales teams have access to information that will improve the sales cycle, from sourcing quotes more quickly to meeting specific shipment/delivery requirements. They can find pricing and finance information even if it's after hours and the finance team is unavailable. Integrated systems facilitate up-to-date product catalogues and cross-sell opportunities, shortening the time it takes to turn a prospect into a customer.

This enables salespeople to give accurate information to customers without delays and thereby improving customer service and driving customer loyalty.

Information from the Sage ERP system can be displayed directly on the interactive dashboard for quick and easy access. For example, sales staff can easily check the availability of stock across different locations and can check the real-time status of orders without having to rely on multiple, disparate systems or consulting colleagues who may not be available. This enables sales staff to give accurate information to customers without delays and thereby improving customer service and driving customer loyalty.

## Drive productivity with mobile CRM

Sage CRM enables mobile sales teams to access their important customer information from the latest mobile devices. Additionally, the system's native apps for the iPhone and Android devices provide mobile sales teams with real-time data to help them manage their business relationships wherever they are, even when out of coverage.

Sage CRM includes mobile access so sales teams can see critical customer information while on the move.

"Now that we have an integrated system where everyone is working together and sharing the same information, we are much more efficient."

**Lori Necyk**
CFO,
Alberta Construction Safety Association

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