sage

Focused Sales Management with Sage CRM

Make the most of every sales opportunity.

Sage CRM directs your sales efforts towards 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 sales people 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 that needs it.

Providing an end-to-end view of every opportunity from within one, easy to use screen, Sage CRM means an end to chasing around for information. Sage CRM gives full visibility of what is happening with every prospect and customer, simplifies forecasting and strengthens pipeline management.

Integration with leading Sage software systems gives sales staff access to both financial and non-financial customer data, for a complete 360 degree view of the customer across front- and back-office departments.

Benefits Snapshot

- Maximise 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, realtime information

- Empower your team and boost productivity with a single view of leads, opportunities, tasks and activities

- Enables quarterly sales performance monitoring improves consistency across the sales organisation

- Maximises cross- and up-sell opportunities

- Great user experience on any Browser with cross-browser compatibility

- Leverages financial information from the back-office system

- Reduces 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

- Effective team collaboration on opportunities and leads with Business Collaboration powered by Yammer

Focused Sales Management with 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 analyse and manage deals at every stage.

The Interactive Dashboard

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

The interactive dashboard can be customised to display relevant information from within Sage CRM, feeds from websites and information from the integrated Sage system. Gadgets within the dashboard can be linked to provide a real-time view of multiple customer information.

A pre-installed sales dashboard is available out-of-the-box or users can customise 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 LinkedIn® all from this customisable workspace.

This removes the need for users to switch between screens, maximising the efficient use of their time and boosting productivity. Gadgets can be positioned and sized accordingly providing users with maximum flexibility on the layout of their dashboard and delivering a rich and personalised user experience.

Management of Opportunities and Leads

Using Sage CRM, sales users 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 up-sell 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 straight-forward process. It also guarantees that leads are handled by the employees most qualified to assist the client and only relevant parties are privy to information.

Sage CRM permits sales reps and managers to effectively analyse 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.
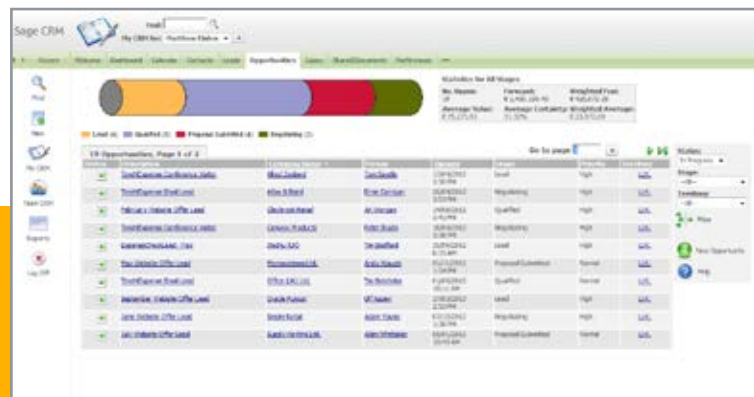
Sage CRM provides detailed business insight data as well as graphical interpretations on the state of the business at any moment in time allowing businesses to strategically plan and gain insights on future performance.

Report charts are highly visual and can be incorporated into presentations for a professional look and feel. The charts are all configurable, customisable 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 maximises 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.

Territory Management

With Sage CRM, assignment rules automatically route leads to the relevant sales representatives based on territories. It is possible to reate new teams and re-assign ownership of teams as well as view marketing campaigns, response rates and associated sales revenue by territory.
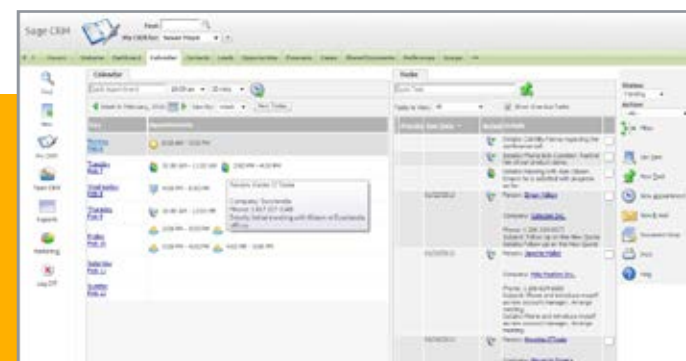
> "The system has played a significant part in growing sales. To compete in the market you want to have accurate information so you can make quick decisions and that is something we have achieved with Sage CRM."
>
> Chakri Wicharn, Information Manager, Fuji Xerox, Thailand

Sales Process Automation

In Sage CRM, the sales process is automated to enable users to concentrate on their primary purpose which is selling. The in-built workflow can be followed out-of-the box or customised 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 summarising 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 users 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.

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

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.

Focused Sales Management with Sage CRM

This synchronisation of information fosters organisational 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.

Sage CRM delivers a seamless calendar management experience thanks to real-time synchronisation between Sage CRM and MS Exchange. This enables mobile users to access up-to-date appointments, tasks and contacts within Sage CRM on their smartphone, laptop or desktop PC for maximum ease-of-use and productivity.

System Integration

With Sage CRM and System integration, sales executives have access to customer data from the back-office allowing a true single view of the customer. This ensures that the sales executive is equipped with the most accurate and up-to-date information regardless of where that information is located. Operations are optimised as a result and there is less potential for delay, misunderstanding and error.

Information from the Sage 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.

Anytime, Anywhere Workforce

Sage CRM enables mobile sales teams access their important customer information from the latest mobile devices. Additionally, Sage CRM's native apps for the iPhone and Windows 8 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 equips the sales team with mobile access providing them with critical customer information while they are on the move.

About Sage CRM

Over 14,000 small to mid-sized businesses across the globe use Sage CRM every day to accelerate sales, drive business productivity and make every customer interaction count. It is used by enterprising, growing companies seeking new ways to interact with customers, leverage the power of social media and take advantage of the latest mobile developments to further grow their business. When combined with Sage software, our customers enjoy better business insight, increased efficiencies and productivity, and gain a single, customer-centric view across their entire business. So whether you're just starting out or have already grown to several hundred employees, Sage CRM can help accelerate your business success.

Start your 30-day journey to business success now at www.sagecrm.com