



Introducing **sage** CRM

An easy-to-use, adaptable, insightful CRM solution

John Woodward
October 12, 2018

- Introducing Sage CRM
- What makes Sage CRM different
- How Sage CRM can help your business grow
- Extend and adapt Sage CRM for your business
- Supporting management with valuable business insight
- Empower your team be more productive with Sage CRM
- Powerful tools to support your teams and drive productivity
- Sage 100cloud Integration

A world map with a glowing blue grid overlay. The continents are labeled: NORTH AMERICA, SOUTH AMERICA, AFRICA, EUROPE, ASIA, and AUSTRALIA. The text 'sage CRM' is positioned at the top center.

sage CRM

Over 15,000 Customers

In 70 Countries

Across every industry vertical

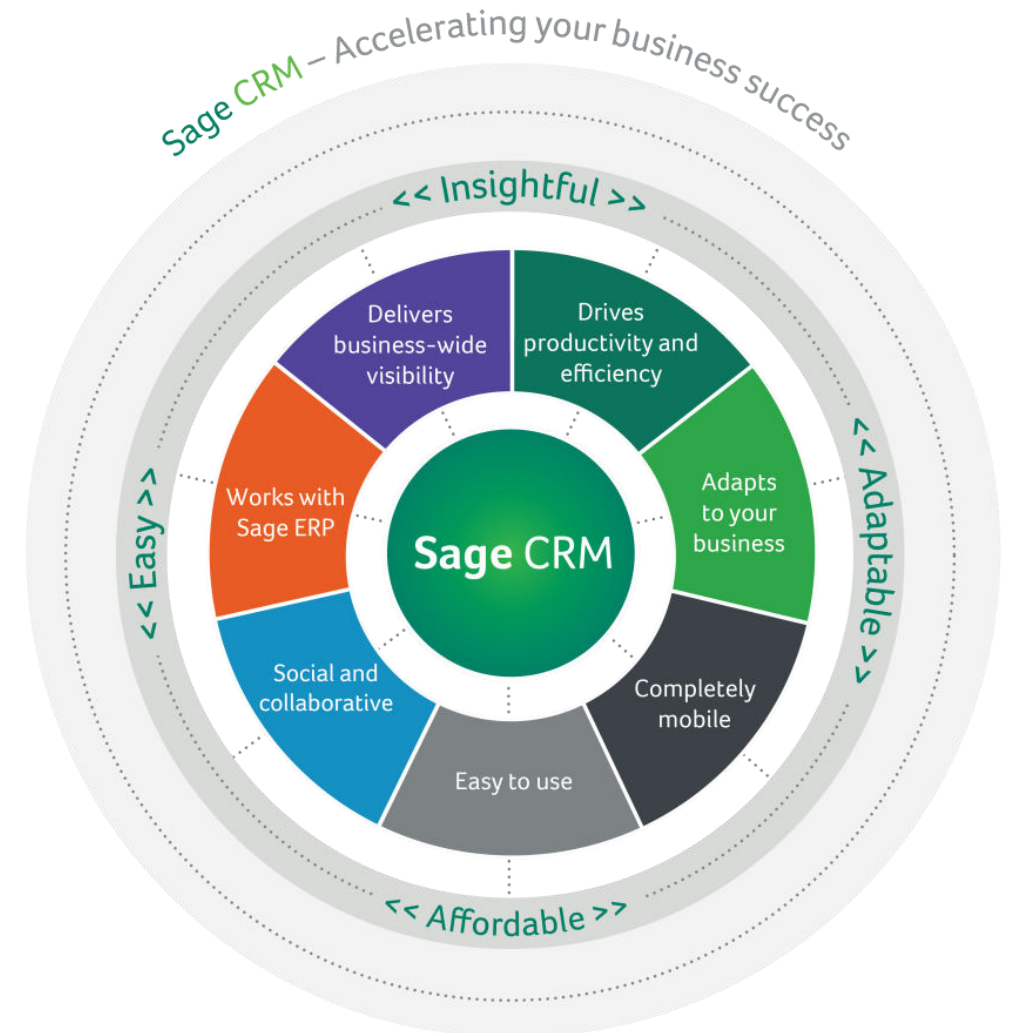
Designed for small and medium businesses



sage CRM

An affordable, adaptable and easy to use CRM solution designed with the needs of small and medium sized companies at its core.

Using Sage CRM our customers save time, increase productivity and gain greater visibility across the business for actionable decision making.



Gartner



What makes Sage CRM different?



With more than 6 million customers worldwide, we understand what today's companies need to be successful

YOUR CHALLENGE

- We recognise that the world you do business in is changing, and how you interact with customers and grow your business is changing too.
- You need more than just great sales, marketing and customer service to manage all your customer interactions and be successful.
- You need social interaction and collaboration; you need access anytime, anywhere; you need better business insight and you need maximum productivity and efficiency across your entire business.
- You need solutions that are as individual as your business, can adapt to your changing needs and that will grow as your business grows.

OUR COMMITMENT

- Sage CRM adapts to how you work, both now and in the future.
- It is easy to deploy, install, manage, learn and maintain for companies who want to focus on their business not on their software.
- Combined 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 is affordable, so you can be assured you are getting the best possible value for money.

How CRM can help your business grow

An intuitive and easy to use CRM



Drive efficiency and work smarter and faster with an intuitive CRM solution.

Gain valuable business insight and see how your business is performing, and take corrective action when needed.

Improve sales forecasting accuracy and make critical sales assessments against your business KPIs.

Give your teams the tools they need to succeed and easily automate their key business processes to help them get their job done quickly and efficiently.

Sell smarter and accelerate sales team performance, never missing an important deal.

Work anywhere, anytime and gain access to up-to-date customer information and prepare for important meetings while on the road.

Collaborate effectively across teams and put processes in place that help everyone become more productive and efficient.

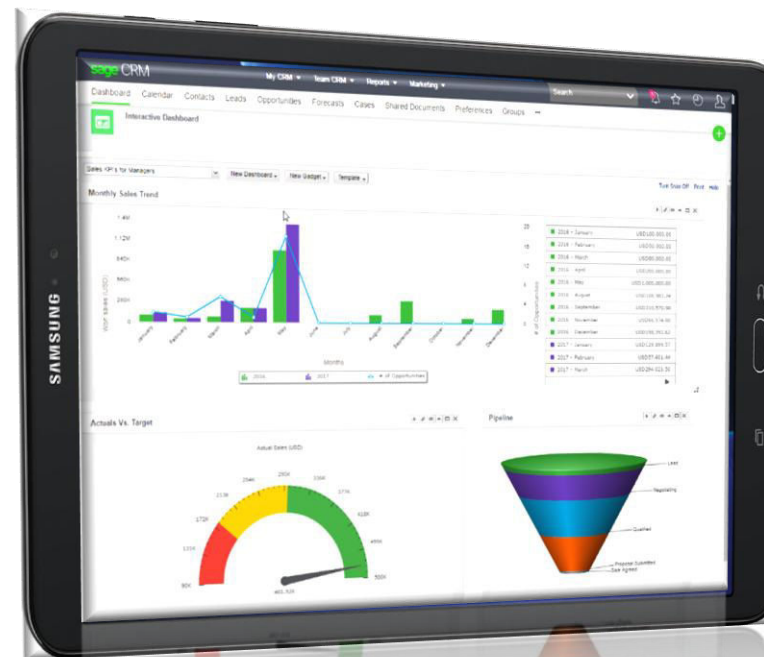
Adapt Sage CRM to suit your unique business needs now and in the future.

Know your business - Grow your business.



Sage CRM is an affordable, insightful and easy to use CRM solution that easily adapts to the needs of small and medium businesses.

A contemporary user experience and intuitive design boosts the productivity of everyone in your company, so they can focus on growing the business.



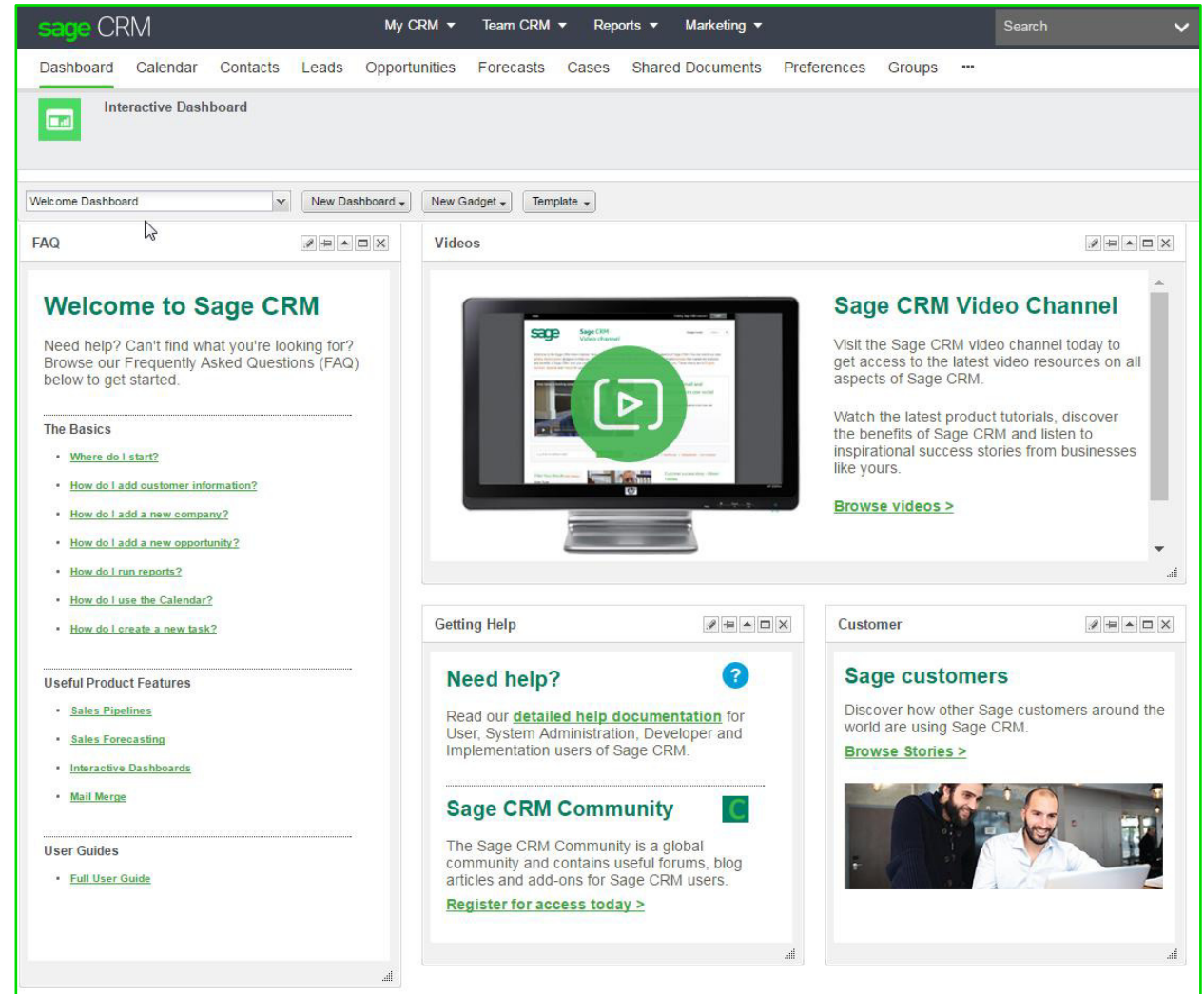
Sage CRM enhances your customer relationships by supporting your teams with a tool that can help them get their job done quickly and service customers efficiently.

With better insight, you know where your business stands and have the visibility to make the right decisions and grow your business.

Intuitive CRM your teams will want to use



- Sage CRM is simple and easy to use, with an intuitive UI that is designed to help you be more productive and access all the information you need quickly and easily.
- An intuitive CRM solution for growing companies - you and your team can get started within minutes.
- Videos, tutorials, help guides and a contextual guided tour help you find your way around.
- Enables you to focus your efforts on closing the sale, growing your customer base and forging deeper relationships with your customers.



Supporting managers with valuable
business insight

Supporting management with valuable business insight



- Real-time access to important information from across the business gives business owners and managers the information they need to make strategic business decisions.
- Get the most from your people with insight into your marketing, sales and customer service activities including the sales pipeline, marketing campaigns and RoI and customer service cases.
- Dedicated tools for managers deliver comprehensive sales-oriented data and insights designed to help you improve effectiveness and efficiency to drive revenue.



Supporting management with valuable business insight



- Generate a return on investment faster.
- Become more productive by automating key business processes.
- Make more informed business decisions.
- Monitor the performance of your teams in real-time.
- Gain quick insight into business performance so you can identify the areas that need your attention before it's too late.
- Create more strategic business plans for the future based on the performance of your business.
- Depend on a CRM solution helping over 15,000 small and medium sized businesses around the world.

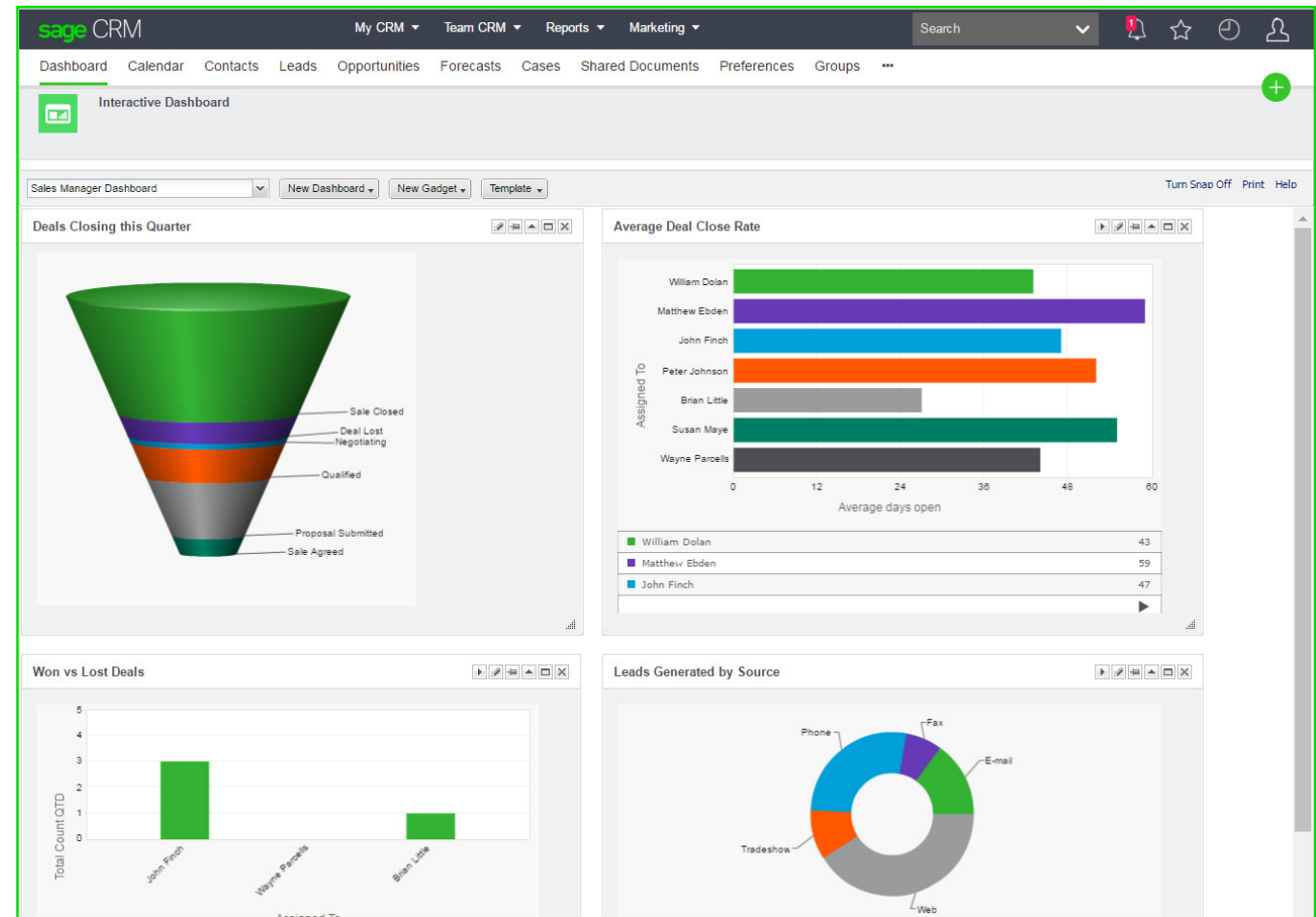
A large green circle with a thin white border, containing text about industry analyst backing.

These key benefits are backed up by key industry analysts like Forrester, Ovum and Info-Tech Research Group, who have independently reviewed and evaluated Sage CRM.

Evaluate how your business is performing in real-time



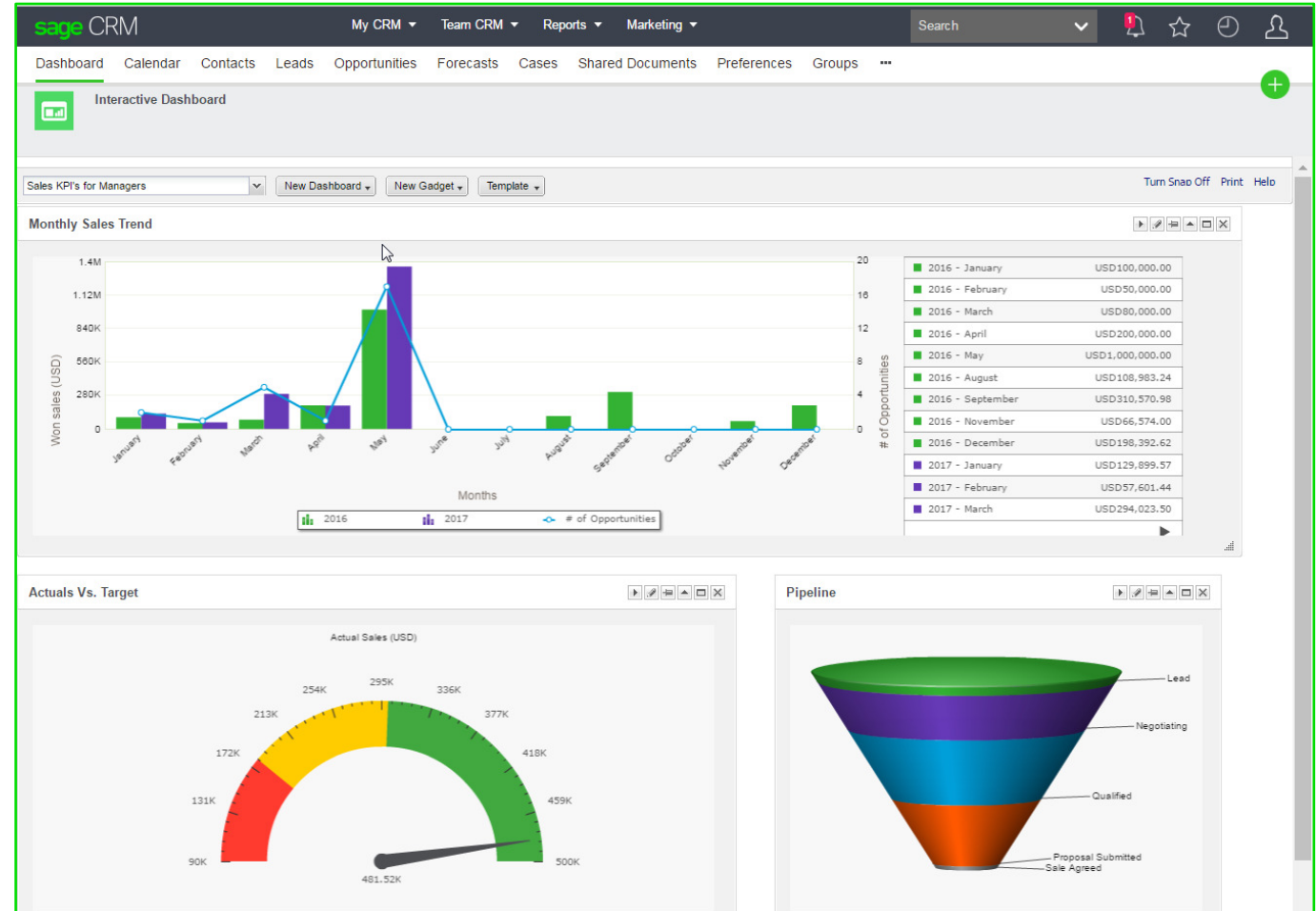
- Gain insight into key sales performance indicators so you can determine how effective your sales efforts are and what corrective action needs to be taken.
- Quickly assess how healthy your teams sales pipeline is for greater sales performance analysis. Gain insight into valuable information such as KPIs, sales performance, opened and closed sales, opportunities and forecasting data.
- Use this information to quickly create visual reports, for at-a-glance assessments, business insight and informed decision-making.



Business Accelerators for Sales



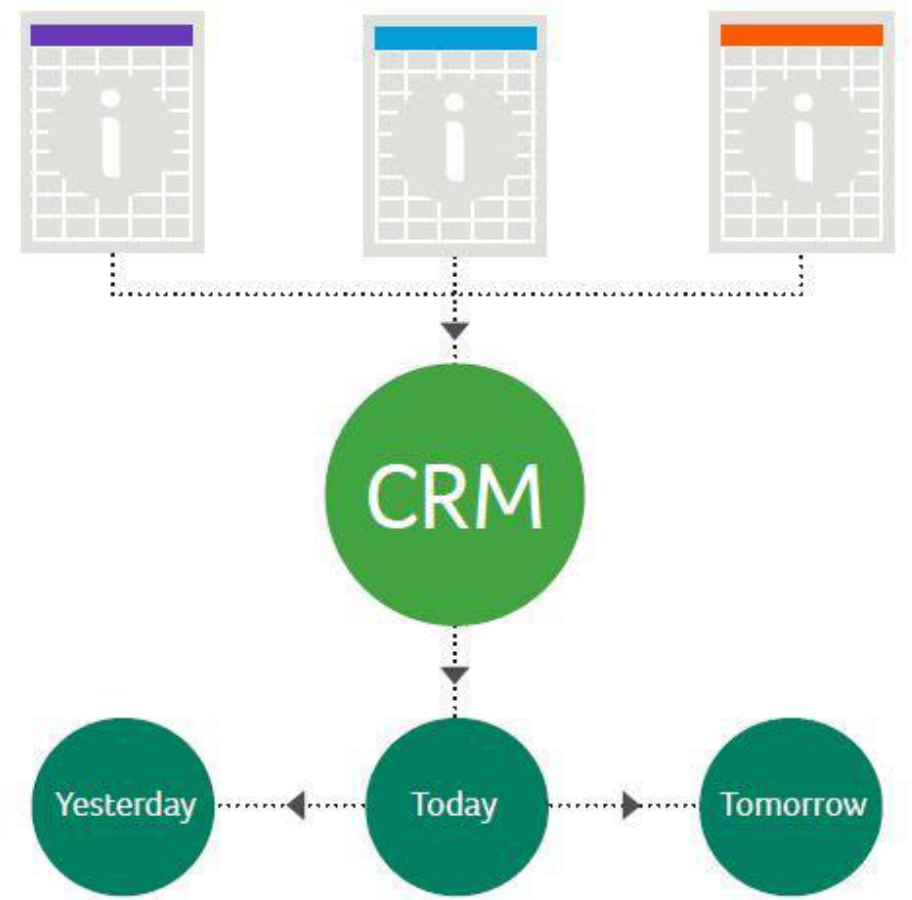
- Business Accelerators for Sales* offer comprehensive sales-oriented data and insights, built-in alerts, sales workflows, dashboards, sales performance charts and KPIs enabling better insight for actionable decision making.
- Management reports and dashboards provide at-a-glance insight into business performance through KPIs, comparisons and emerging trends.
- Preconfigured alerts and notifications help you and your sales managers get real-time updates on your business KPIs as they happen.



Extend & adapt Sage CRM
to suit the needs of your business

Adapts to your business

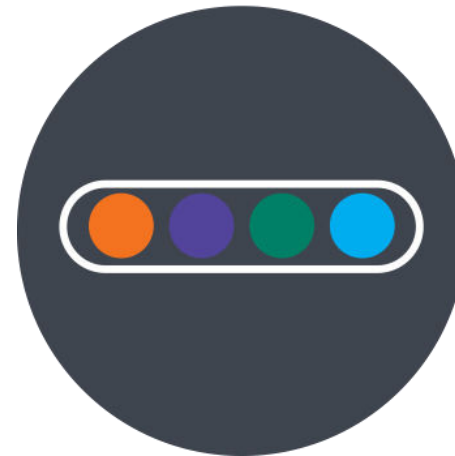
- We understand your business is growing and our intuitive CRM tool is designed to adapt to your needs now and in the future.
- Streamline business processes to match how your business works - highly customisable workflows make business processes simpler and easier to follow.
- Capture information specific to your business – Sage CRM fields and screens can easily be adapted to your needs.
- Create new business modules to manage key areas of your business with ease.



Automate your key business processes with Sage CRM



- Sales, marketing and customer service workflows are available out-of-the-box so you can streamline processes in these key business areas.
- This eliminates the need to perform manual tasks around daily activities, improving the productivity of your teams.
- These workflows are fully customisable enabling you to write your own rules based on your unique business needs.
- Alternative workflows are also available to suit shorter sales processes, simplifying the sales follow-up process.
- Standardising working methods in these areas ensures nothing is missed, so valuable information doesn't slip through the cracks.



Empower your teams to be more
productive and efficient

Accelerate your business success



Award-winning
CRM for
business owners
and managers,
looking to drive
efficiency across
the business.



Drive productivity across your sales team and direct all your sales efforts towards your most profitable and winnable deals



Create highly targeted marketing campaigns, eliminate guesswork and optimize your marketing resources.



Delight your customers at every touch point and outperform the competition.



Manage every area of your business and generate a quicker return in your investment in Sage CRM

Accelerate your sales performance



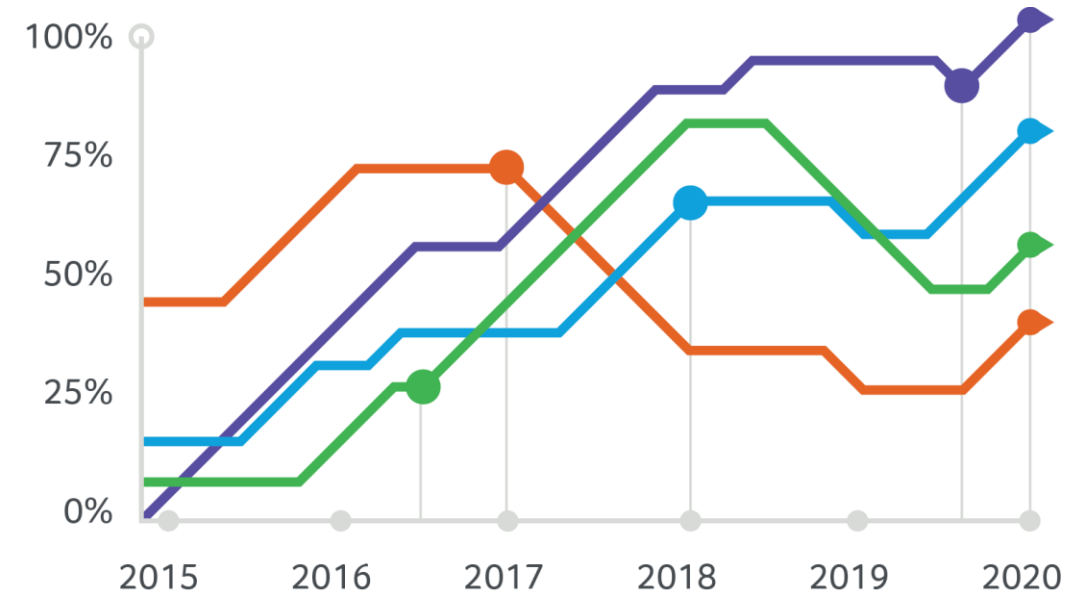
- Sales Force Automation
- Opportunity and Pipeline Management
- Forecasting and Reporting
- Sales manager Dashboards
- Quotes and Orders
- Territory Management
- Sales Workflow
- Lead Management
- Calendar Management
- Fully featured mobile CRM
- Dedicated sales apps
- Business Collaboration powered by Yammer



What does this mean for your business?



- Simplify the sales process and make the most of every sales opportunity. from initial lead through to close.
- Gain visibility and insight on your sales performance using highly visual sales dashboards.
- Act on detailed reporting and graphical representations for immediate analysis and quick decision-making.
- Automate proposal and quotation processes.
- Ensure sales team has access to all the information they need from Sage CRM online, anywhere they go, at any time.



Targeted measurable marketing

- Campaign management
- Campaign reporting and analysis
- Marketing Dashboard
- List segmentation
- Rapid lead to opportunity management
- Campaign cloning
- Integrated telesales follow-up
- Reporting and analysis
- Email marketing
- Social CRM



What does this mean for your business?

- Deliver targeted marketing campaigns, eliminate guesswork and make the best use of your marketing resources.
- Manage your marketing campaigns across multiple channels and maximise your marketing budget.
- Integrate social media activity into your marketing mix, engage your customers and prospects and promote your products and services online.
- Manage and track your leads and ensure that sales opportunities are never missed and always acted upon.
- Share best practice with colleagues and execute consistent campaigns.



Deliver exceptional customer service



- Case Management
- Escalation and notification alerts
- Knowledge base Management
- Workflow approval process
- Customer Service Dashboard
- Detailed analysis on call volumes and case resolution
- Traffic light monitoring
- Staff performance monitoring
- Reporting



What does this mean for your business?

- Manage and resolve customer queries and issues efficiently and effectively.
- Increase the productivity of your customer service representatives.
- Monitor the performance of your teams performance and ensure members are equipped to resolve customer issues and deliver an efficient level of service.
- Build an online knowledgebase of common issues and known solutions so your customer service teams can respond quickly to customer queries.
- Review customer service performance with powerful reporting capabilities.



Powerful tools to support your teams and
drive productivity

Unlock new possibilities with social CRM

- Sage CRM integrates with key social media applications such as Facebook, Twitter and LinkedIn.
- Now you can engage with prospects and customers collaboratively and generate leads, foster loyalty and increase revenues.





Sage CRM for LinkedIn

- Research prospects and connect with customers from within Sage CRM.



Sage CRM for Twitter

- View and manage Twitter feeds directly from within Sage CRM
- Update your company Twitter feed and track your brand or company mentions, all from within Sage CRM.



Sage CRM for Facebook

- Gain instant information about customers and prospects by associating Facebook profiles with prospect accounts for more detailed information

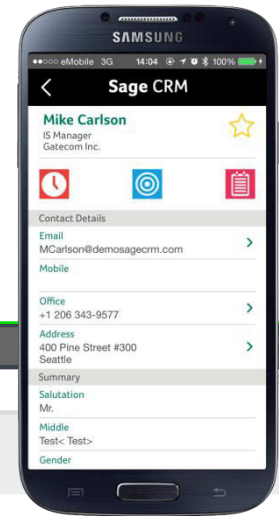


Go Mobile - Take Sage CRM with you



Sage CRM offers a range of solutions for you and your mobile workforce. You can access all the information you need from Sage CRM on your mobile device regardless of your location.

- Perform key sales activities quickly and easily with Sage CRM's native mobile apps.
- Access key customer information, schedule and manage activities, view history, and record email, calls, and notes.
- Work effectively on the go and quickly search and update contacts, opportunities, leads and cases.
- Choose from fully-featured mobile CRM or our dedicated sales apps.



sage CRM My CRM Team CRM Reports Marketing Search

Dashboard Calendar Contacts Leads Opportunities Forecasts Cases Shared Documents Preferences Groups ...

Find: [Search] My CRM for: William Dolan

Statistics for All Stages

Number of Opportunities:	Forecast:	Weighted Forecast:
7	USD 680,746.25	USD 234,100.22
Average Value:	Average Certainty:	Weighted Average:
USD 97,249.46	53.57%	USD 52,097.93

Qualified (2) Proposal Submitted (3) Negotiating (1) Sale Agreed (1)

7 Opportunities, Page 1 of 1

Status	Description	Company Name	Person	Opened	Stage	Priority	Territory
➡	50 Users plus consulting	Design Right Inc.	Arthur Browne	12/09/2016 8:24 AM	Negotiating	Normal	US East
➡	100 User licenses	Eurolandia	Kieran O'Toole	11/28/2016 5:01 AM	Qualified	Normal	US East
➡	Training course	Gatecom Inc.	Simon Yaltoy	01/16/2017 12:52 PM	Proposal Submitted	High	US West
➡	20 User Deal	Harlob Controls Limited	Tony Smith	12/11/2016 7:31 AM	Qualified	Normal	US East
➡	200 User Global Deal	Maverick Papers	Annette O'Toole	11/28/2016 8:33 AM	Proposal Submitted	Normal	US Central
➡	10 User Pilot	Maverick Papers	Annette O'Toole	12/07/2016 8:41 AM	Sale Agreed	Normal	US Central
➡	Phase 2: 30 User rollout	Maverick Papers	Annette O'Toole	12/07/2016 8:47 AM	Proposal Submitted	Normal	US Central

Status: In Progress Stage: --All-- Territory: --All-- Filter New Opportunity Help

Business Collaboration

Drive employee productivity and knowledge exchange with social-style collaboration powered by Yammer.

- Increase employee engagement
- Facilitate peer-to-peer learning
- Drive productivity through collaboration
- Collaborate across teams

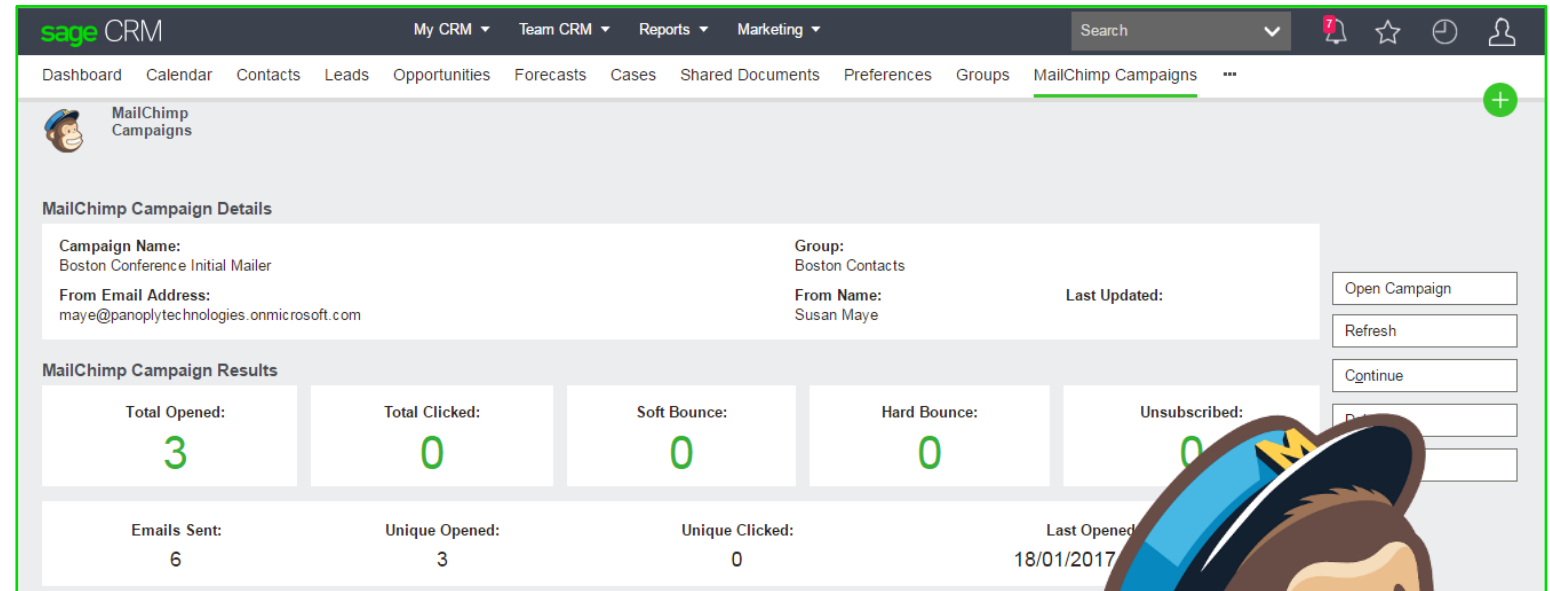


Email marketing made easy



Email marketing is one of the most effective marketing tools for small and medium sized companies. With minimal resources you can send personal, relevant emails to your customers.

- Sage CRM offers customers 2 email marketing integrations to suit their needs.
- These user-friendly email marketing tools enable you to create, send and track email campaigns and reach your contacts with the right message at the right time.
- And you can monitor open rates and responses to your campaigns in real-time and use this information to improve future campaigns.



Sage 100cloud Integration



- Prospect Quotes and Quotes
- Sales Orders
- RMA Entry
- Customer Maintenance
- Customer Inquiry
- Business Insights Explorer Views
- Prospect to customer promotion
- Synchronize customer & contact details
- Sage 100cloud Security

The screenshot displays the Sage CRM interface for a sales order. The top navigation bar includes links for Summary, Quotes, Orders, Notes, Communications, Documents, Tracking, and Relationships. The main form is titled "Order Information" and contains fields for Order Number (0000234), Order Date (5/4/2017), Order Type (Standard Order), Salesperson (0100), Sage CRM User (Susan Maye), and Sage CRM Opportunity (OTF ORDER:0000180). It also includes fields for Customer Number (01-ABF), Name (American Business Futures), Customer PO Number, Tax Schedule (WI), Confirm To (Artie Johnson), E-mail (artie@sage.sample.com), Fax Number, Ship Date (5/4/2017), Ship Via (UPS RED), FOB, and Comment. Below this is the "Bill To Address" section with fields for Bill To (01-AVNET), Address (2131 N. 14th Street), City (Milwaukee), State (WI), Name (American Business Futures), Accounting Department, ZIP Code (53205-1204), and Country (USA). The "Ship To Address" section follows, with fields for Ship To (2), Residential Address, Address (Racine Warehouse), City (Racine), State (WI), Name (American Business Futures), ZIP Code (53120), and Country (USA). The "Item Detail" section at the bottom shows Item Code (2481-5-50), Item Description (DESK FILE 5 1/4" CAP 50), Unit of Measure (EACH), Warehouse (001), Ordered (10), Back Ordered (0.00), Unit Price (19.95), Discount Percent (0.00), Extension (0.00), Promise Date (5/4/2017), and Comment. A table at the bottom lists the items with columns for Item Code, Description, Ordered, Back Ordered, Unit Price, and Extension.


Item Code	Description	Ordered	Back Ordered	Unit Price	Extension
2481-5-50	DESK FILE 5 1/4" CAP 50	10	0.00	19.95	0.00

Demonstration



sage CRM My CRM ▾ Team CRM ▾ Reports

Summary Quotes **Orders** Notes Communications Documents Tracking Relationships ...

 Opportunity: OTF Order:0000180 Phone: 414 555-4787
Company: American Business Futures E-mail: artie@sage-sample.com
Person: Artie Johnson

Order Information

Order Number: 0000234 Order Date: 5/4/2017 Order Type: Standard Order Salesperson: 0100 Sage CRM User: Susan Maye Sage CRM Opportunity: OTF ORDER:0000180
Customer Number: 01-ABF Name: American Business Futures Customer PO Number: Tax Schedule: W1
Confirm To: Artie Johnson E-mail: artie@sage-sample.com Fax Number:
Ship Date: 5/4/2017 Ship Via: UPS RED FOB: Comment:

Bill To Address

Bill To: 01-AVNET Address: 2131 N. 14th Street City: Milwaukee State: WI
Name: American Business Futures Suite 100 ZIP Code: 53205-1204 Country: USA United States
Accounting Department

Ship To Address

Ship To: 2 Residential Address Address: Racine Warehouse City: Racine State: WI
Name: American Business Futures 5411 Kendrick Place ZIP Code: 53120 Country: USA United States

Item Detail

Item Code: 2481-5-50 Item Description: DESK FILE 5 1/4" CAP 50 Unit of Measure: EACH Warehouse: 001
Ordered: 10.00 Back Ordered: 0.00 Unit Price: 19.950 Discount Percent: 0.00 Extension: 0.00
Promise Date: 5/4/2017 Comment: Drop Ship OK New Delete Reset

Item Code	Description	Ordered	Back Ordered	Unit Price	Extension
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sage

Questions

sage CRM

