



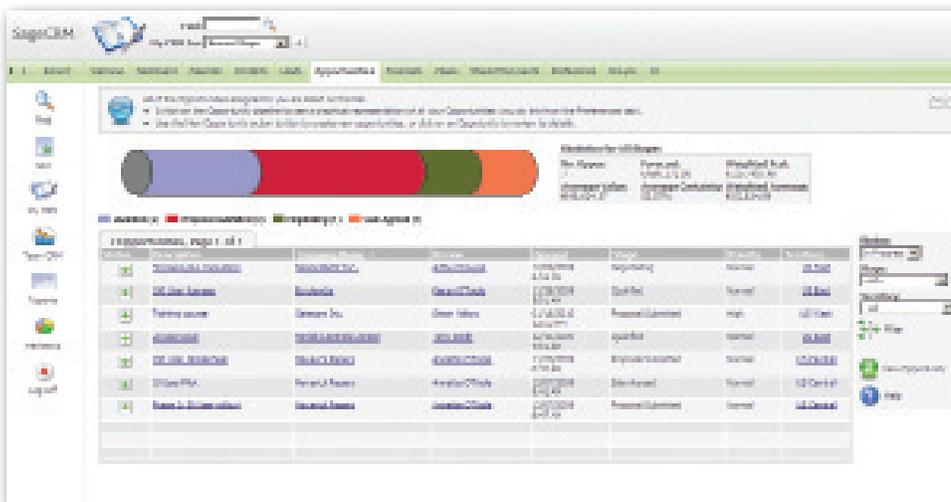
## SageCRM | Focused Sales Management

Equipping your sales team with the complete customer information and the necessary tools to enable them to do their job effectively is very important. Easy to use, SageCRM provides users with instant access to calendars, accounts, reports, pipelines, contacts and call lists, empowering sales people to sell. All sales information is stored, tracked, and reported, providing organizations with meaningful and up-to-date information on the performance of the sales team.

The information is displayed on the SageCRM interactive dashboard, from where users can control and manage all activities. Users can choose to use the preinstalled sales dashboard available out of the box or customize their own dashboard to create a bespoke workspace to suit their needs. Users can also create company-specific dashboards to help better manage key accounts.

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

With SageCRM Sales Force Automation, real-time sales opportunity analysis is provided instantly. SageCRM provides a snapshot of all opportunities within the sales pipeline, allowing sales teams to effectively analyze and manage deals at every stage. The sales process is automated, streamlining your business and enabling better business management. The most up-to-date and complete customer information is instantly and easily retrievable within SageCRM through the interactive dashboard, helping users to have a better view of their customer at all times.



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

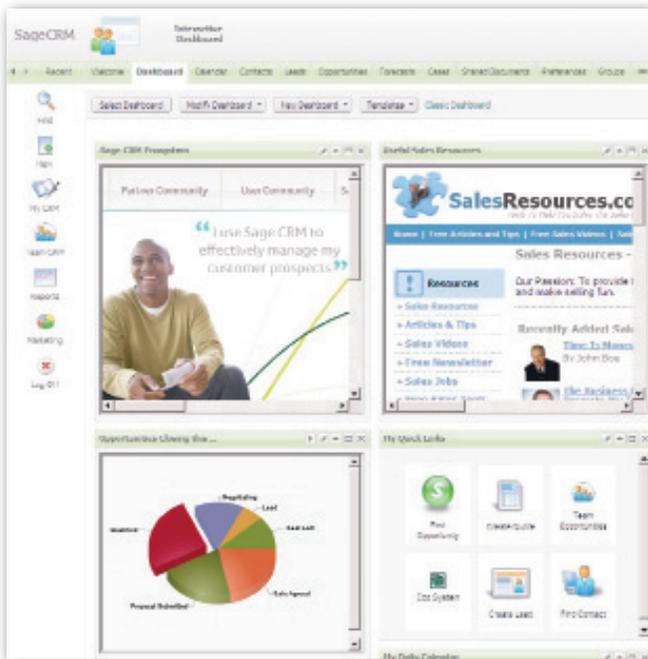
### BENEFITS SNAPSHOT

- Improves transparency in the sales pipeline
- Enhances sales forecast accuracy
- Monitors progress against quota
- Enables quarterly sales performance monitoring
- Leads to improved win/loss ratio
- Leads to shortened sales cycles
- Increases prospect-to-customer conversion rate
- Delivers metrics on most valuable customers
- Improves consistency across the sales organization
- Enables more effective identification of new market opportunities
- Maximizes cross-and upsell opportunities
- Reduces sales training costs
- Eliminates manual/duplicated sales processes
- Improves team collaboration on opportunities
- Decreases time spent on administrative tasks
- Improves prospect targeting
- Provides visibility on sales team performance, including identifying sales opportunities and pipeline potential
- Increases visibility on customer interaction across departments and activities
- Automates proposal and quotation processes
- Leverages financial information from the back-office system
- Reduces time spent in the office on sales administration (more time on sales calls)
- Increases sales effectiveness through the ability to access and download customer information remotely
- Boosts sales team productivity by delivering a single view of leads, opportunities, tasks, and activities on the interactive dashboard

## 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. The interactive dashboard can be customized to display relevant information from within SageCRM, feeds from websites and information from an integrated Sage ERP system. Gadgets within the dashboard can be linked to provide a real-time view of information multiple customers. 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 LinkedIn®, 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. Gadgets can be positioned and sized accordingly, providing users with maximum flexibility on the layout of their dashboard and delivering a rich and personalized user experience.



- ◆ SageCRM's interactive dashboard in SageCRM 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

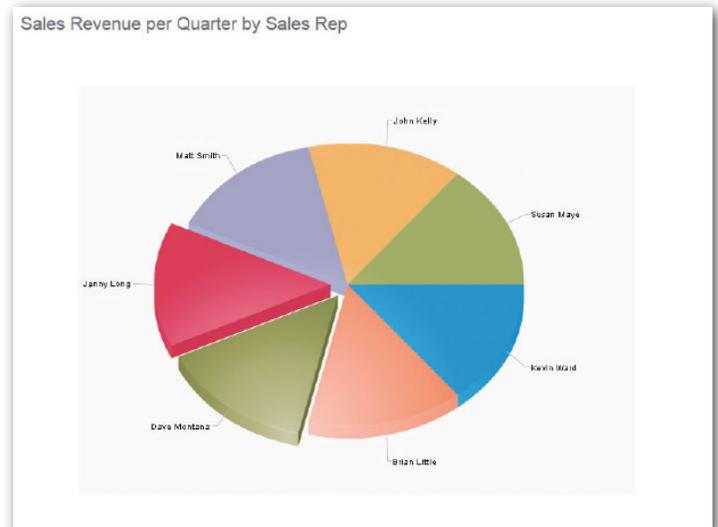
Using SageCRM sales users can track leads from first contact to final sales closure. This ensures that time and resources are invested into the deals that are most likely to close and enables the sales team to easily identify and recruit new customers and resell or up-sell to existing accounts. With SageCRM, 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 employees most qualified to assist the client, and only relevant parties are privy to information. SageCRM 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

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

This powerful analytical information can be displayed on the interactive dashboard in a graphical format that makes sense to senior sales executives, allowing them to monitor team performance, identify issues, and make strategic decisions, all in real time.



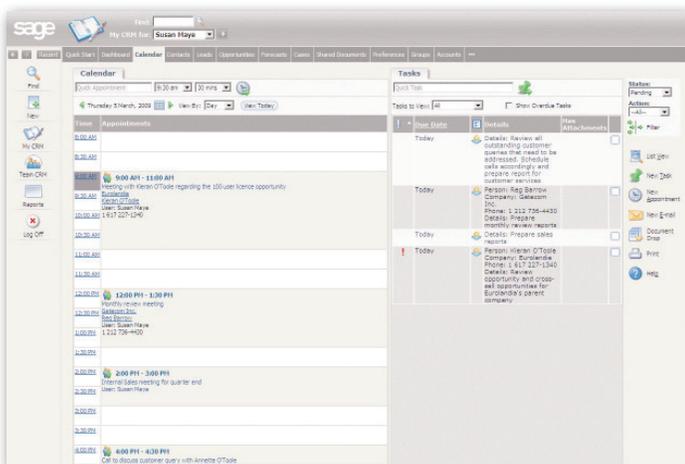
- ◆ With SageCRM, it is easy to create impactful, visual reports.

## Quotes and Order Generation

With SageCRM, 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. SageCRM 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 SageCRM, assignment rules automatically route leads to the relevant sales representatives 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.



- SageCRM 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

Vital customer and prospect information can be retrieved quickly and easily using SageCRM. Time is organized and administrative tasks are reduced to a minimum. In SageCRM, the sales process is automated to enable users to concentrate on their primary purpose, which is selling. The inbuilt workflow can be followed out of the box or customized to reflect your business process. The automation in SageCRM 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 processes for maximum effectiveness. SageCRM 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

SageCRM provides sales users with a complete diary solution with daily, weekly, monthly, and yearly views. In addition, on-screen 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.

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

## Anytime, Anywhere Workforce

SageCRM provides the sales team with the ability to work from a mobile device regardless of location. This ensures that they have fast, up-to-date access to critical customer data while out on the road. SageCRM supports online access to the system from iPhone, Blackberry, or Windows® mobile devices and has been optimized for the iPhone.



- SageCRM equips the sales team with mobile access, providing them with critical customer information while they are on the move.



## ERP Integration

With SageCRM and ERP 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 optimized as a result, and there is less potential for delay, misunderstanding, and error. 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.

**With SageCRM, the next step is automatically built into the process, so we're always moving forwards together to make the most of sales opportunities and build closer customer relationships. It helps us to check that in chasing a new lead, salespeople are investing their time where it will bring best return."**

Mark Lightowler, managing director,  
Kaysersberg Plastics.

### About SageCRM

SageCRM is used by over 10,000 organizations in 70 countries worldwide to manage their critical sales, marketing, and customer service activities every day. Award-winning SageCRM equips businesses with the tools they need to find new customers, close sales more quickly, and build lasting, more profitable relationships across all channels. Regardless of how, when, or where customers, partners, and prospects choose to interact with your business, SageCRM provides a decisive advantage by delivering a comprehensive, easy-to-use system to successfully manage these relationships. Thanks to its ERP integration capabilities, the SageCRM front office is powered by data from the back office to give sales, marketing, customer service, and other front-office staff a true 360-degree view of customers across front- and back-office functions, differentiating it from many other CRM solutions in the market today.

Visit the SageCRM Ecosystem at [www.SageCRM.com](http://www.SageCRM.com) to join the conversation on our user and partner communities and to access the full range of SageCRM apps and extras.

### The Sage Difference

- The leading supplier of CRM solutions to SMB organizations worldwide
- Over 6 million customers
- Over 3.1 million SageCRM Solutions users worldwide
- 13,600 employees
- Over 30,000 Sage-certified partners specialising in business applications
- Direct presence in 24 countries
- Relationships with over 40,000 accountancy practices
- 30 years of experience