Sage CRM | 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, Sage CRM provides sales 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 organisations with meaningful and up-to-date information on the performance of the sales team.

The information is displayed on the Sage CRM interactive dashboard from where users can control and manage all activities. Users can choose to use the pre-installed sales dashboard available out-of-the-box or customise 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 non-financial customer data, for a complete 360 degree view of the customer across front- and back-office departments.

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 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 Sage CRM through the interactive dashboard helping users to have a better view of their customer at all times.

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

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 integrated Sage ERP 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.
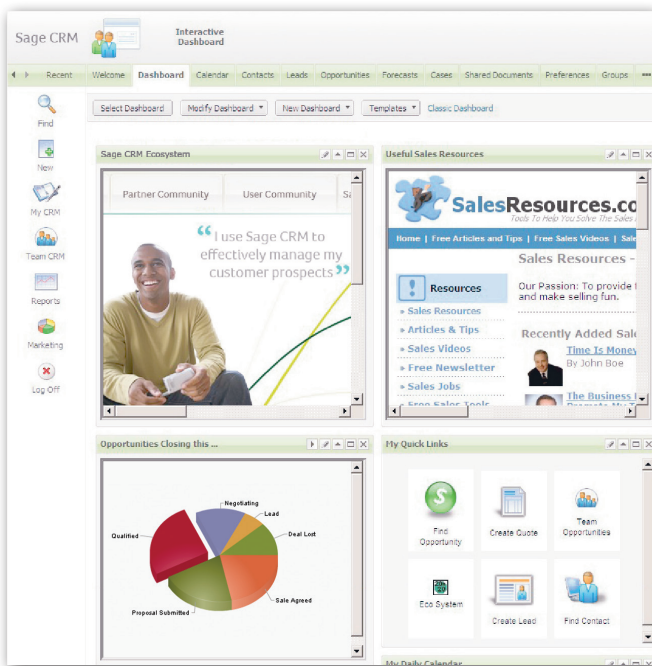
● Sage CRM's interactive dashboard provides the sales team with an intuitive and customisable workspace from which they can better serve their customers and key accounts

## Management of Opportunities and Leads

Using Sage CRM 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 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 graphical 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

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.
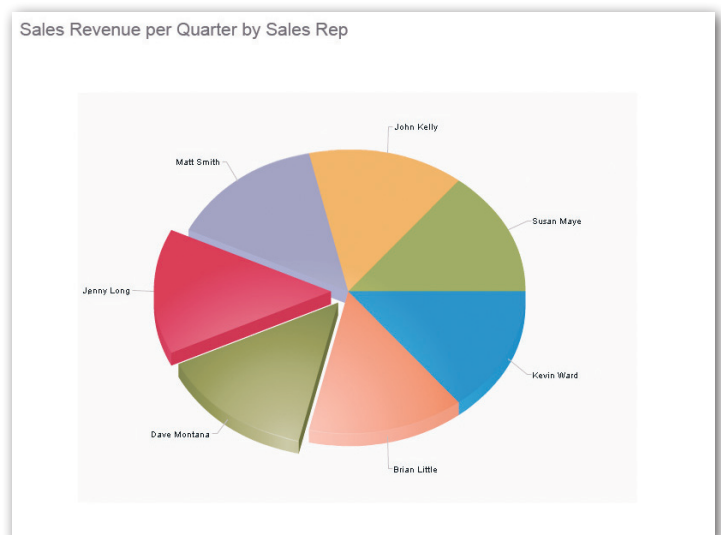

● With Sage CRM, it is easy to create impactful, visual reports.

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 create new teams and re-assign ownership of teams as well as view marketing campaigns, response rates and associated sales revenue by territory.
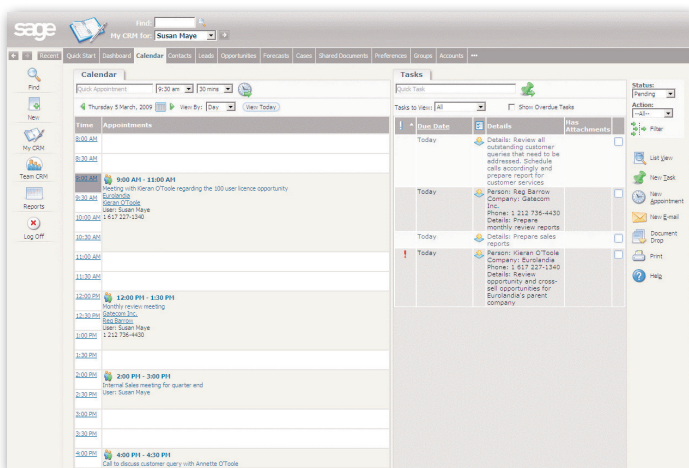
● Sage CRM provides sales executives with a complete diary solution allowing the sales team to effectively keep track of client visits, pipeline meetings and routine tasks.

Sales Process Automation

Vital customer and prospect information can be retrieved quickly and easily using Sage CRM. Time is organised and administrative tasks are reduced to a minimum. 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. 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 synchronization 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.

Anytime Anywhere Workforce

Sage CRM 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 whilst out on the road. Sage CRM supports online access to the system from iPhone, Blackberry or Windows® mobile devices and has been optimised for the iPhone.

● Sage CRM equips the sales team with mobile access providing them with critical customer information while they are on the move.

ERP Integration

With Sage CRM 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 optimised 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 Sage CRM, 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."**
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> — Mark Lightowler, Managing Director, Kaysersberg Plastics.

About Sage CRM

Sage CRM is used by over 10,000 organisations in 70 countries worldwide to manage their critical sales, marketing and customer service activities every day. Award-winning Sage CRM equips businesses with the tools they need to find new customers, close sales faster 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, Sage CRM provides a decisive advantage by delivering a comprehensive, easy-to-use system to successfully manage these relationships. Thanks to its ERP integration capabilities, the Sage CRM 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 Sage CRM Ecosystem at www.sagecrm.com to join the conversation on our user and partner communities and to access the full range of Sage CRM apps and extras.

The Sage Difference

- The leading supplier of CRM solutions to SMB organisations worldwide
- Over 6.3 million customers
- Over 3.1 million Sage CRM Solutions users worldwide
- Over 13,400 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 experience

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