



# Sage CRM | Focused Sales Management

## 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 up-selling 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 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.

### 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, real-time 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

The screenshot shows the Sage CRM interface. At the top, there's a search bar and navigation tabs like 'Recent', 'Welcome', 'Dashboard', 'Calendar', 'Contacts', 'Leads', 'Opportunities', 'Cases', 'Shared Documents', and 'Preferences'. Below this is a 'Statistics for All Stages' box with the following data:

No. Oppor:	Forecast:	Weighted FoCl:
10	£ 1,435,264.43	£ 426,072.38
Average Value:	Average Certainty:	Weighted Average:
£ 75,271.62	21.32%	£ 22,572.00

Below the statistics is a legend for opportunity stages: Lead (4), Qualified (0), Proposal Submitted (4), and Negotiating (2). The main part of the screen is a table titled '10 Opportunities, Page 1 of 2' with columns for Status, Description, Company Name, Name, Contact, Status, Priority, and Estimated. The table contains 10 rows of data, including entries like 'Tiret/Koosse Conference Visitor', 'Tiret/Koosse Final Lead', 'February Website Offer Lead', etc.

● 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.

## Management of Opportunities and Leads



- 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.

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.



**“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 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.

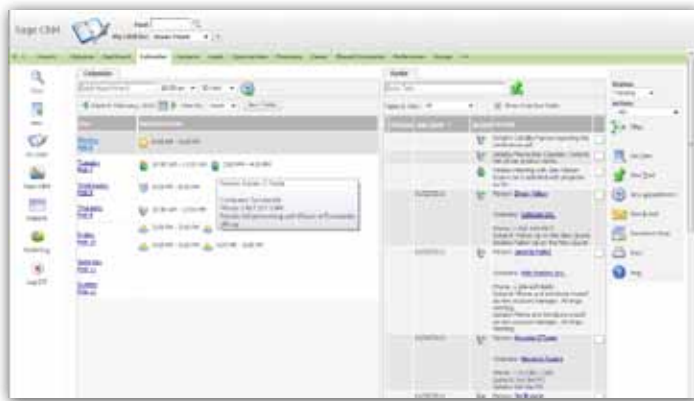
Report charts are highly visual and can be incorporated into presentations for a professional look and feel. The charts are all configurable, customisable and skinable so users can modify the charts to suit their specific needs.

## 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 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

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 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.

## 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.

## Anytime, Anywhere Workforce



**“Sage ERP Accpac is the tool we are using to ensure consistency and standardisation in the way we do things.”**

**Paul Johnson,  
General Manager,  
Verbatim Asia Pacific**

Sage CRM provides the sales team with the ability to work from a mobile device regardless of their 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, Android and Tablet devices.



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

#### About Sage CRM

Sage CRM is used by over 12,000 organisations in 70 countries worldwide to manage their critical sales, marketing and customer service activities every day.

Sage CRM is optimised specifically for small and medium businesses. Easy to use and quick to deploy in the cloud or on-premise, it delivers a rapid return on investment so you see a positive impact on your business straight away. Plus, it can be easily adapted by you to make it fit how you work, saving you time and money, both now and in the future. In this way, we help you get the most from your CRM investment and accelerate your business growth.

For more information visit [www.sage.co.uk/crm](http://www.sage.co.uk/crm) or call 0845 111 99 88.

#### The Sage Difference

- The leading supplier of CRM solutions to SMB organisations worldwide
- Over 6.3 million customers
- Over 3.1 million Sage CRM Solution 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