

“With Sage CRM, I can look at the metrics and see what material we send out and how effective it is. We like to segment our markets rather than ‘blanket bomb’ people with irrelevant information. Now we can customise what we do and make it more effective.”

— Lee Wilson, Group Marketing Manager, Tilney

Campaign Management

With Sage CRM, every phase of every marketing campaign can be tracked to provide meaningful analysis and campaign measurement.

Sage CRM empowers the marketing team to view activities, objectives, leads and follow-ups, and to drill down to specific activities including communications, opportunities, responses, budget, costs and prospects, managing and tracking every element of every marketing campaign.

Sage CRM makes it easier and more automated to roll out marketing campaigns putting marketing resources to their best use as it delivering detailed information. The success of individual or ongoing campaigns can be tracked in real-time, at any stage from the initial lead to the close.

With user-friendly tools and reports, the marketing team have the ability to match sales revenues to specific campaigns and to analyse marketing campaigns per lead source. Powerful and flexible profiling of customers and prospects based on criteria selected by the marketing team as well as direct integration to mass e-mail and CTI functionality, makes Sage CRM an invaluable tool for organisations and marketers. Sage CRM can be used to analyse marketing campaigns by lead source or evaluate other important campaign details by using powerful yet user-friendly tools and reports. Sage CRM not only tracks response rates, it also permits the matching of sales revenues to specific campaigns. Management can use invaluable analysis tools in Sage CRM to determine marketing ROI and cost versus sales analysis.

Lead Management

Managing and tracking leads is vital to ensure that sales opportunities are not missed and are actioned accordingly. With Sage CRM, leads can be qualified per selected criteria for follow-up and tracked at each stage in the process.

Full workflow management ensures that leads are maximised at all times. They can be assigned to relevant team members to follow up or converted accordingly. Sage CRM provides users with a number of predefined reports to help analyse and track the source of leads. Customised reports can also be designed and displayed on the interactive dashboard for quick reference.

The screenshot displays the Sage CRM interface for user Fred Jones. The main content area shows a summary of 61 leads, broken down into 31 New Leads, 29 Assigned, and 1 Contacted - Awaiting Reply. Below this is a table of leads with the following columns: Status, Description, Company Name, Last name, First name, Stage, Opened, and Territory. The table lists several leads, including those from Storage & National, Michigan Manufacturing, Vacuum Ascent, Container Depository, Eastern Shelter Co, Advisory Boston, Schottenstein Systems, Vision Merchants, Quarries Corp, and Trucking Corp American.

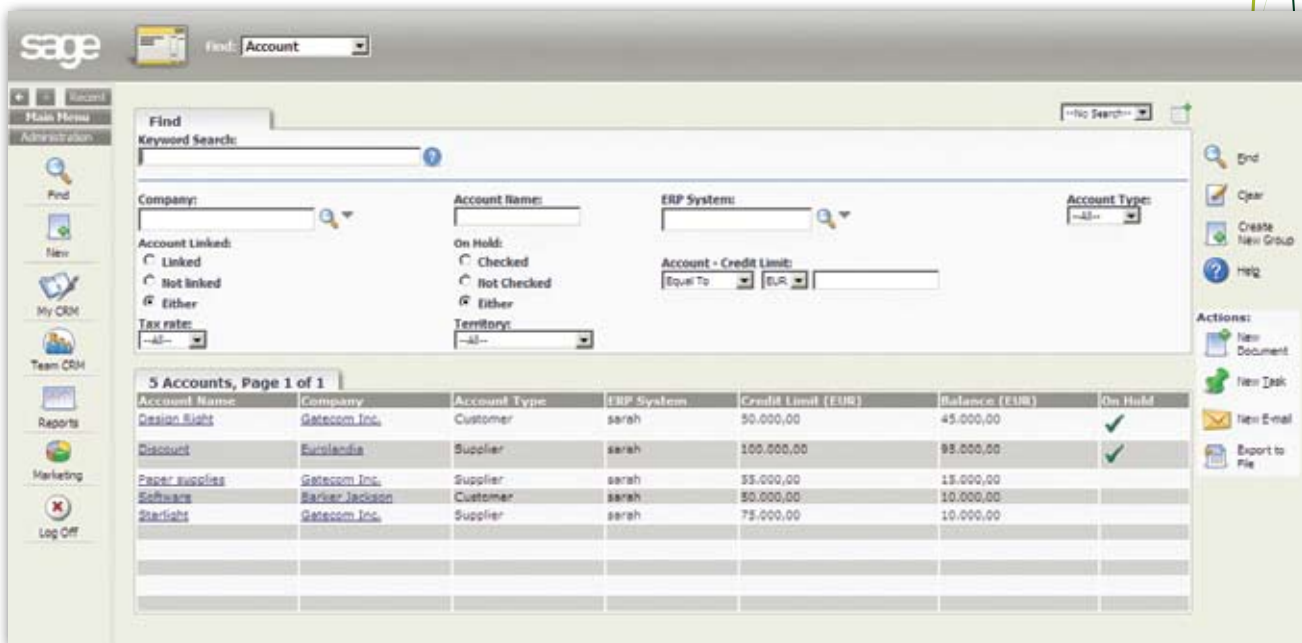
Status	Description	Company Name	Last name	First name	Stage	Opened	Territory
New Lead	ExpenseCheckLead - Fax	Storage & National	Goodwin	Jim	New Lead	20/05/2008 14:49	Marketing - US
New Lead	ExpenseCheckLead - Fax	Michigan Manufacturing	Bracho	Dave	New Lead	04/06/2008 16:32	Marketing - US
Assigned	ExpenseCheckLead - Fax	Vacuum Ascent	Nicholson	Cassandra	Assigned	09/04/2008 19:27	Marketing - US
New Lead	ExpenseCheckLead - Phone	Container Depository	Lane	Simon	New Lead	02/01/2008 08:23	Marketing - US
New Lead	ExpenseCheckLead - Phone	Eastern Shelter Co	Cain	Mark	New Lead	05/07/2008 19:16	Marketing - US
New Lead	Info@pancny.lead	Advisory Boston	Fugleley	Jan	New Lead	10/05/2008 18:01	Marketing - US
New Lead	Info@pancny.lead	Schottenstein Systems	Gadbois	Susan	New Lead	11/05/2008 15:05	Marketing - US
Contacted - Awaiting Reply	Info@pancny.lead	Vision Merchants	Rance	Jeff	Contacted - Awaiting Reply	13/08/2008 13:39	Marketing - US
Assigned	Info@pancny.lead	Quarries Corp	Durham	Chris	Assigned	20/10/2008 13:12	Marketing - US
Assigned	Info@pancny.lead	Trucking Corp American	Green	Steve	Assigned	20/06/2008 19:57	Marketing - US

Sage CRM provides powerful tools to record, track and assign leads allowing your team accurately measure the quality of leads, effectiveness of the marketing campaigns and the ROI achieved.

Sage ERP Integration

Front-to-back-office integration between Sage CRM and Sage ERP systems allows marketing staff to leverage account information, enabling them to identify buying trends or suitable target segments. Access to financial information on customers, provides the marketing team with the ability to create marketing lists based on financial profiles and target customers with good credit ratings and purchase histories. Information from the Sage ERP system can be displayed on the interactive dashboard for quick and easy access, providing marketing teams with access to powerful customer data.

Return on marketing investment can be measured more accurately thanks to back-office integration. Integration between Sage CRM and ERP enables marketing staff to execute highly targeted campaigns based on customers' financial history and enables pin-point measurement of marketing RoI.



The screenshot displays the Sage CRM 'Find' interface. At the top, there is a search bar with 'Account' entered. Below this, there are several filter fields: 'Company', 'Account Name', 'ERP System', and 'Account Type'. There are also radio buttons for 'Account Linked' (Linked, Not linked, Either) and 'On Hold' (Checked, Not Checked, Either). A 'Tax rates' dropdown is set to '-All-' and a 'Territory' dropdown is also set to '-All-'. Below the filters, a table shows 5 accounts on page 1 of 1. The table columns are: Account Name, Company, Account Type, ERP System, Credit Limit (EUR), Balance (EUR), and On Hold. The data rows are:

Account Name	Company	Account Type	ERP System	Credit Limit (EUR)	Balance (EUR)	On Hold
Design Sight	Gatecom Inc.	Customer	sarah	50,000.00	45,000.00	✓
Discount	Eurolandia	Supplier	sarah	100,000.00	95,000.00	✓
Paper supplies	Gatecom Inc.	Supplier	sarah	35,000.00	15,000.00	
Edwards	Barclay Jackson	Customer	sarah	30,000.00	10,000.00	
Starlight	Gatecom Inc.	Supplier	sarah	75,000.00	10,000.00	

With Sage CRM and ERP integration, marketing teams can leverage financial information to target their most profitable customer.

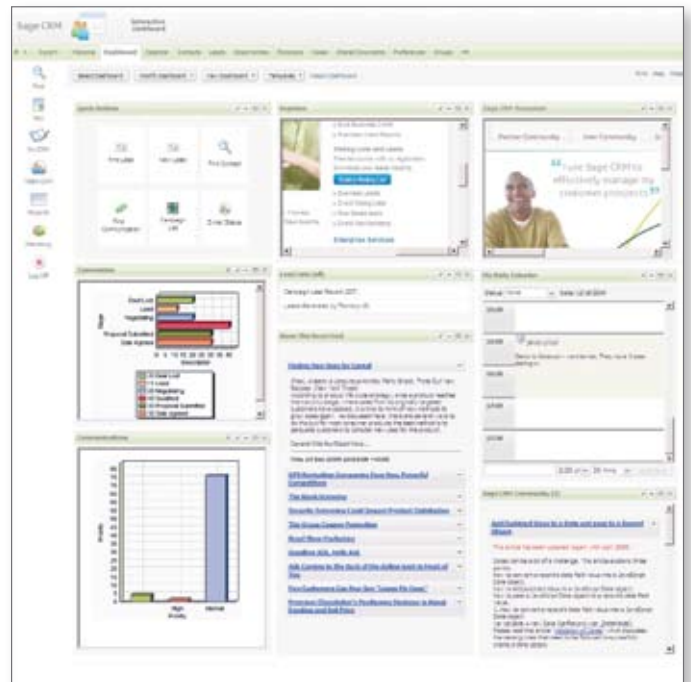
Reporting and Analysis

Sage CRM enables users to take control of their marketing budget by providing extensive planning and reporting tools across all levels of marketing activity. Leads, opportunities and closed sales are all associated back to their originating marketing campaign, so the direct revenue yield for each programme can be calculated accurately. Graphs, charts and reports can be generated and displayed on the interactive dashboard for quick and easy analysis.

The Interactive Dashboard

The interactive dashboard is an intuitive workspace from where the marketing team can view and monitor marketing campaigns and activities. A pre-installed marketing 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.

With the interactive dashboard, the marketing team can link to reports to track the success of marketing campaigns and activities. The dashboard also displays feeds from websites such as news monitoring which will keep them up-to-date with published news on their business and on their competitors. Users can also link to LinkedIn® and other social networking sites to identify networking and marketing opportunities with customers and prospects.



The marketing dashboard provides users with a single view of relevant and comprehensive marketing information for quick and ease of reference.

About Sage CRM

Award-winning Sage CRM delivers full suite CRM (comprising sales, marketing and customer service automation) and offers a broad range of functionality with a low TCO to small and mid-sized organisations globally. Sage CRM equips sales, marketing and customer service teams 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.

The Sage Difference

- The leading supplier of SMB business applications in the world*
- Over 5.8 million customers
- Over 14,500 employees
- Over 30,000 Sage-certified partners specialising in business applications
- Direct presence in 26 countries
- Relationships with over 40,000 accountancy practices
- 28 year's experience
- Over 3.1 million Sage CRM Solutions users worldwide

