



SageCRM Sales

Improve results from first contact to final sale

SageCRM Sales is an easy-to-use solution that helps organizations sell more effectively. By providing instant access to calendars, accounts, reports, pipelines, contacts, and call lists, SageCRM empowers sales professionals with the information needed to close more sales. All sales information is stored, tracked, and reported providing organizations with meaningful and up-to-date information on the performance of the sales team.

Improve sales performance

SageCRM enables sales people to concentrate on their primary purpose—selling. It automates administrative tasks like quotes and order entry. Advanced search capabilities eliminate frustrations that can kill the effectiveness of even the most diligent salesperson. Plus, with instant access to analysis and reporting features, your sales force and managers can easily identify opportunities within the sales pipeline, purchase patterns and preferences, and more.

Manage sales groups more effectively

For sales management, SageCRM delivers the reports real-time that identify how the team is performing, who's winning, and who needs help. It eliminates the shocks and surprises that can destroy a good quarter. It allows you to organize teams and schedule calls with simple point and click technology that coordinates and fills calendars. In addition, SageCRM enables the sales and lead processes to be defined to fit your company's unique sales structure.

BENEFITS

Automates sales processes, enabling sales professionals to concentrate on their primary responsibility—selling

Grants sales reps and managers instant access to reports, graphs, and forecasts for immediate analysis and decision-making

Fosters organizational transparency and enhances the quality of information available

Makes it easy to assign, reassign, and track leads to ensure they are being handled by the most qualified employees

Helps you identify purchase patterns and sales performance by individual, team, territory, etc.

Provides complete bi-directional integration to Microsoft Outlook, saving time and increasing user adoption

Simplifies literature fulfillment

◀ SageCRM tracks leads from first contact to final sales closure, helping you ensure that time and resources are invested into the deals that are most likely to close.

◀ With Sage CRM Sales Force Automation you'll have instant access to real-time sales opportunity analysis.

About SageCRM

SageCRM is an easy-to-use, fast-to-deploy, feature-rich Customer Relationship Management solution with out-of-the-box but configurable business process automation. Access methods include both hosted and deployed models through a Web browser.

FEATURES

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| Calendar Management | SageCRM provides sales users with a complete diary solution with daily, weekly, and monthly views. In addition, onscreen reminders and notification alerts are available to all sales team members. Increases efficiency, punctuality, and convenience. |
| Complete Bi-directional Outlook Integration | It is possible to run e-mail, calendars, and contacts through Microsoft Outlook and all interactions can be automatically synchronized with SageCRM. Contacts, tasks and appointments are automatically updated in both systems. Fosters organizational transparency and enhances the quality and retention of information available to the user. |
| Management of Key Opportunities and Leads | Using SageCRM, sales users can track leads from first contact to final sales closure. Ensures that time and resources are invested into the deals that are most likely to close. Enables the sales team to easily identify and recruit new customers and resell or up-sell to existing accounts. |
| Sales Forecasting and Reporting | Point and Click reporting and graphs are provided by SageCRM along with accurate and timely forecasts, which are accessible by sales representatives and managers alike. Enables sales teams and management to access data for immediate analysis and decision-making ultimately maximizing the potential of each lead. Delivers on-demand reports as specified by the management team thereby ensuring transparency; high visibility ensures effective communication and accurate forecasting. |
| Account and Activity Management | With SageCRM, leads can be escalated and reassigned easily, follow-up activities can be automated, and field-level security is a simple and straight-forward process. Ensures that leads are handled by the employees most qualified to assist the client and only relevant parties are privy to information. |
| Client Awareness | The most up-to-date and complete customer information is instantly and easily retrievable within SageCRM. Helps organizations to have a better view of their customer and deliver superior customer service. |
| Graphical Reporting | Graphical forecasting and reporting features allow filtering of data per the user's criteria. It is also possible to use system default reports or easily create new reports with the aid of a reporting wizard. Provides detailed data as required by businesses as well as graphical interpretations on the state of the business at any moment in time. |
| Quotes and Order Entry | Sales users have the functionality to automatically generate sales proposals using predefined templates. The most up-to-date quotes are delivered with access to the latest product information. Maximizes efficiency, reduces the margin for error, and professionalizes communications. |
| Territory Management | With SageCRM, assignment rules automatically route leads to the relevant sales representatives based on territories. It is also possible to create new teams and re-assign ownership and view marketing campaigns, response rates, and associated sales revenue by territory. Provides insight into sales effectiveness and performance by territory. |
| Escalation and Notification Alerts | SageCRM delivers periodic messages to sales managers summarizing critical opportunity and forecast information for their direct reports. Ensures business opportunities are always retained and worked on. |
| Sales Process Automation | Vital information can be retrieved quickly and easily, time is organized, and administrative tasks are reduced to a minimum. Enables users to concentrate on their primary purpose, which is selling. |
| Workflow | With SageCRM, the sales process may be organized simply, diaries coordinated and filled, and tasks scheduled with easy-to-use point and click technology. The built-in workflow can be followed out-of-the box or customized to reflect your business process. Automates the sales process, enabling sales to be more effectively managed and maximizing sales effectiveness. |
| Pipeline Management | SageCRM enables sales teams to effectively analyze and manage the sales pipeline, with the ability to review the history of every account. Valuable sales resources can concentrate on selling while sales teams are more effectively managed. Purchase patterns and sales performance become clear ensuring that the value of each deal is maximized. Increases revenue growth as sales professionals are provided with tools to increase productivity and efficiency. |
| Document Sharing | Literature fulfillment can be automated and simplified. Decreases administrative and other non-revenue generating activities which all impact on business and personal performance. |
| My CRM and Team CRM | Individual and team views of activities are available. Gives both individuals and management a single view of business activities as and when required. |

ABOUT SAGE SOFTWARE

Sage Software supports the needs, challenges, and dreams of more than 2.7 million small and midsized business customers in North America through easy-to-use, scalable, and customizable software and services. Our products help manage a complete range of business functions including: accounting, operations, customer relationship management, human resources, time tracking, merchant services and the specialized needs of the construction, distribution, healthcare, manufacturing, nonprofit, and real estate industries.



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Your business in mind.