

Sage CRM

Exceptional Customer Service

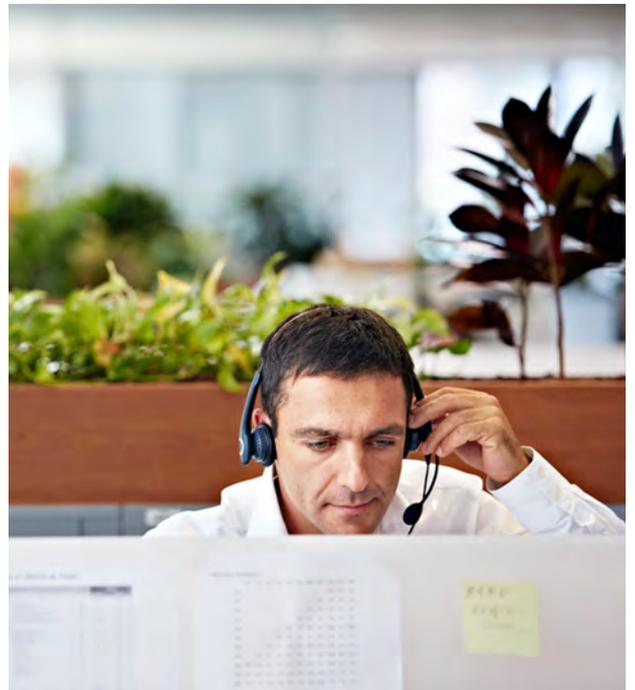
Deliver fast, efficient customer service

Winning a new customer is only the beginning of what should be a long and profitable relationship. But keeping customers happy means ensuring they get what they want, when they want it. From defining processes, to tracking cases and solutions, you can resolve customer issues effortlessly.

Sage CRM is designed to help you manage and resolve customer inquiries and issues efficiently and effectively. You have access to the customer information you need.

Your customer service staff gains full access to every customer communication, so you can have meaningful and satisfactory interactions with your customers.

When you integrate with a Sage ERP solution, Sage CRM gives your service staff access to all the customer data they need for a complete view of every customer; making every customer interaction that much more effective. Integrated Sage ERP data can be displayed directly on the interactive dashboard so your staff can see a customer's activity at a glance.



Benefits Snapshot

- Manage your customer accounts with insight and collaboration
- Respond to customer cases quickly. Reduce response times to customer service requests
- Enables agents to quickly and accurately find the right answer the first time
- Increases customer satisfaction measurements and benchmarking
- Increases productivity of customer support representatives
- Provides self-service facility to customers around common issues
- Enables customer issues to be tracked and responded to, regardless of who answers the phone or receives the email
- Monitors service performance against service level agreements
- Reduces customer support costs and cost of customer retention
- Decreases the number of customer complaints received and increases customer retention
- Enables benchmarking/score carding of customer service operations on an on-going basis
- Delivers a single view of relevant and comprehensive information on the interactive dashboard

The screenshot shows the Sage CRM interface. At the top, there's a navigation bar with 'Home', 'Dashboard', 'Calendar', 'Contacts', and 'Cases'. Below that is a traffic light indicator showing 6 cases in total, with a legend for 'Logged (4)', 'Investigating (1)', and 'Waiting (1)'. The main area displays a table of 6 cases.

ID	Priority	Severity	Created By	Created On	Description	Assigned To	Status	Location	Actions
S-10020	High	2.0	Archie D'Zade	6	Issue with Bank Holiday recording	Graham Rogers	Logged	US East	[Icons]
S-10020	High	2.0	Ben Bester	7	Faulty report	Graham Rogers	Logged	US West	[Icons]
S-10021	Normal	2.0	Garath McLeod	5	Error on log out	Graham Rogers	Logged	US East	[Icons]
S-10023	Normal	2.0	Garath McLeod	3	Navigation problem	Graham Rogers	Waiting	US East	[Icons]
S-10024	Normal	2.0	Garath McLeod	6	Table not tabling correctly	Graham Rogers	Investigating	US East	[Icons]

Customer inquiries can be monitored in real-time to ensure that SLAs are reached. A traffic lighting system automatically highlights cases that do not meet SLA response times.



“With information seamlessly at our fingertips, we can instantly respond to customers’ requirements and queries and give them the answers they need. It’s very impressive!”

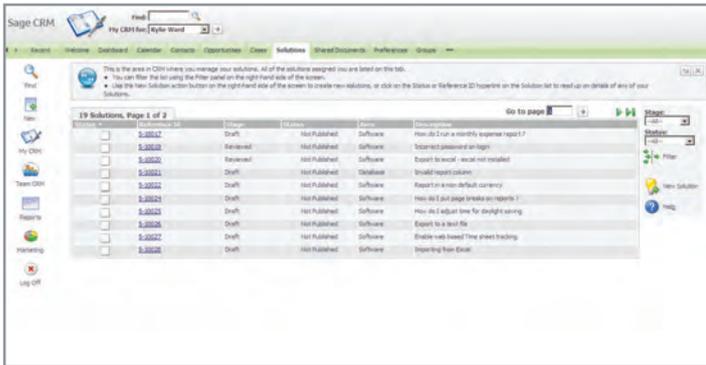
Malcolm Ditty,
Director,
The Signature Works Ltd

Case Management

Sage CRM provides your customer care team with the ability to record customer inquiries/incidents which need to be followed-up. If a case is not followed-up within the time allocated, it will automatically trigger an escalation procedure to inform your customer service manager. This ensures that customer cases are attended to in a timely manner and that issues do not get lost 'between the cracks'. Cases can be tracked and followed up directly from the interactive dashboard without the need to switch between screens, maximizing team productivity.

Knowledge Base

Sage CRM provides central knowledge-base capabilities for technical solutions to known issues or questions. This provides agents with easy and immediate access to a central bank of information and keeps accurate records of contacts with customers via case tracking and communication logs.



Sage CRM equips customer service agents with predefined solutions that they can access when trying to resolve a customer service issue.

Customer service staff can find a solution to a customer inquiry quickly and easily. This responsiveness results in improved customer care. A full workflow approval process ensures that only solutions which have been reviewed and approved by the relevant manager are published in the knowledge base.

Workflow

The ability to define customer care processes and escalation points is controlled and managed by a feature in Sage CRM called workflow. If a customer service case or inquiry remains unresolved for longer than the predefined time, the workflow process triggers an automatic escalation notification to the customer care manager.

This alert is a powerful automatic reminder that ensures each case is followed-up on. Workflow can be fully customized in order to ensure that cases are progressed in accordance with company-specific requirements.

Reporting

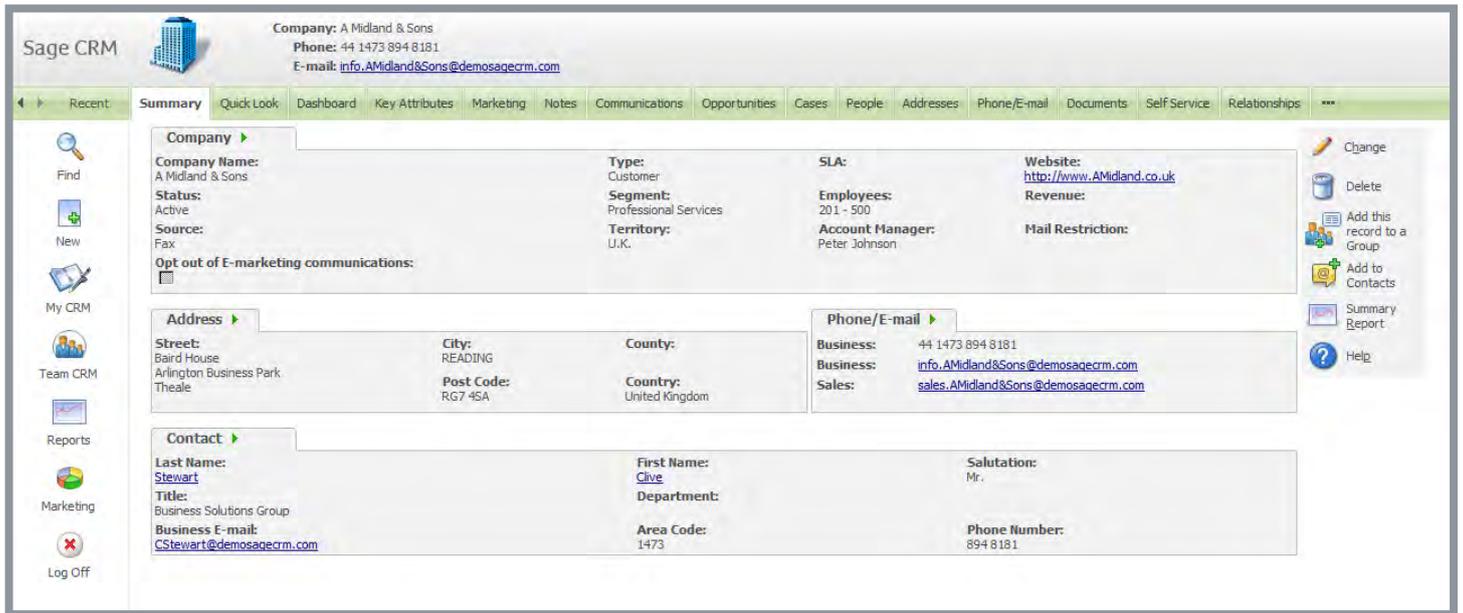
Sage CRM provides powerful reporting capabilities which make it easy to monitor and measure customer service performance. Reports and dashboards provide overview information and detailed analysis on metrics such as call volume, case resolution times, communications, and follow-up statistics.

Customers can be provided with customized reports to demonstrate that the resolution criteria within their SLAs are being met. These can be displayed on the interactive dashboard for quick and easy access and analysis.

Report charts are highly visual and can be incorporated into presentations for a professional look and feel. Charts are completely customizable so users can modify the charts to suit their specific needs.

"We believe that we're now one of the leaders in the industry in providing critical information to clients, instantly accessible whenever they want it. This helps us to win new business and enhance our service to existing clients."

Simon Adcock,
Managing Director,
ATEC Security Limited



Sage CRM maximizes customer satisfaction and drives customer loyalty by equipping agents with comprehensive, real-time information on the customer and their account.

Team Management

Sage CRM ensures your management team have access to key company information so they can assess important metrics. These include information such as case volume and the case resolution times, as well as qualitative metrics such as the prioritization of cases and overall customer satisfaction. This means that your staff are motivated and fully equipped to resolve customer issues and your customers receive a more meaningful and personalized service.

Web Self-service

Sage CRM offers a web self-service module that enables businesses to allow their customers, partners and suppliers to access a subset of their Sage CRM data and functionality over the web at their convenience. This capability can be fully integrated within the company's own website, ensuring that their customers benefit from an entirely seamless experience.

ERP Integration

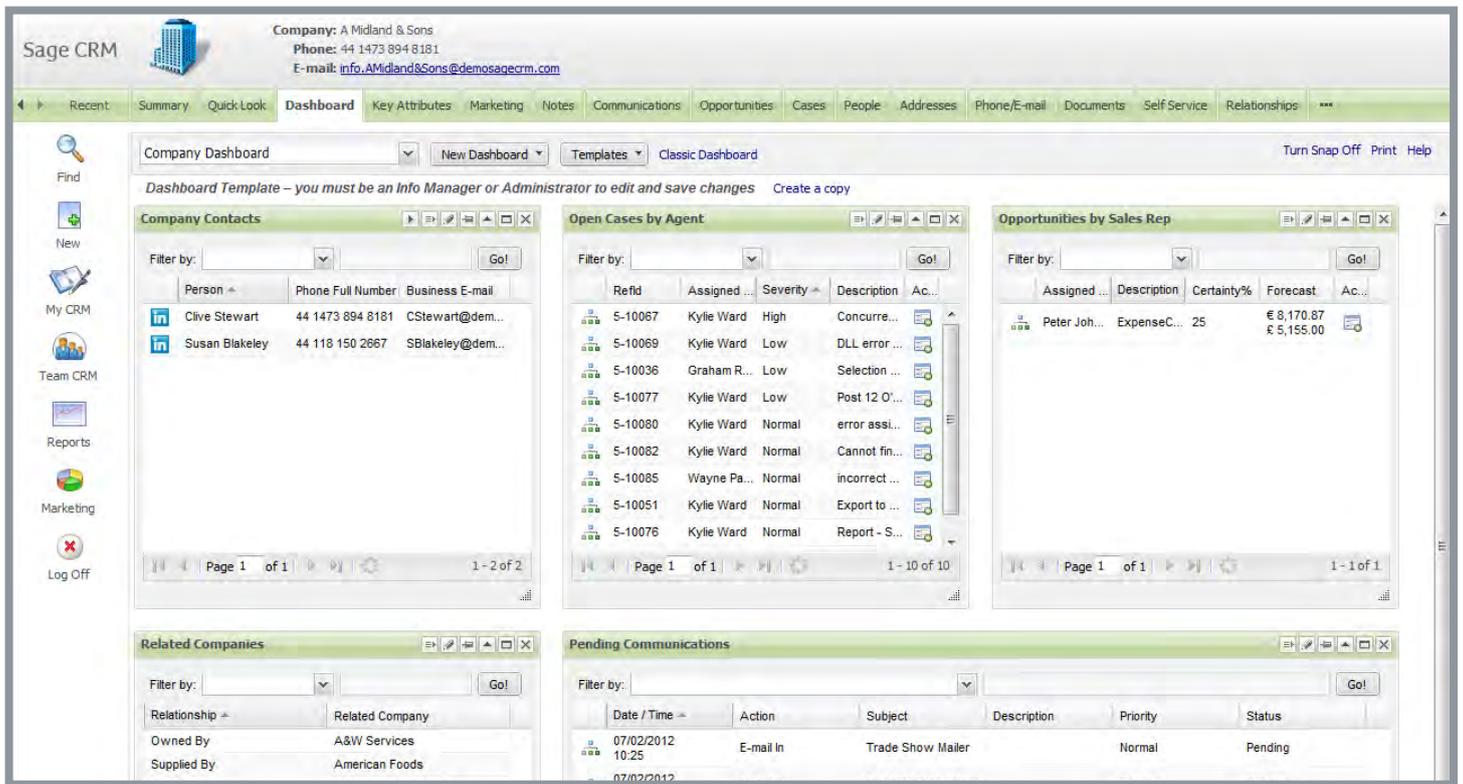
By joining your CRM and ERP systems together you provide your customer service teams with a multi-dimensional view of customers that makes it easier to deal with inquiries and complaints.

For example, by being able to match a complaint to an order and invoice in Sage ERP, your customer service can initiate a more timely response and quicker resolution, reducing the risk of long-term damage to the customer relationship. Valuable customers can be identified, and, if needed, referred back to sales to further nurture the relationship.

Information from your Sage ERP solution can be displayed on the interactive dashboard for quick and easy access, equipping the customer service team with powerful information to provide customers with a consistent and exceptional service.

“Previously, incoming customer queries could only be dealt with by looking through disconnected spreadsheets, documents and billing software. Now it's all on one screen which makes our people much more productive.”

Jay Lentz,
Client Development
Executive.
Lincoln Waste
Solutions
Connecticut



Boost productivity for your customer service team with the interactive dashboard – an intuitive and configurable workspace where they can manage all customer queries.

The Interactive Dashboard

Users can view communications, contacts, leads, opportunities or cases all through the interactive dashboard. This ensures that customer service teams are equipped with the most accurate and up-to-date information at their fingertips regardless of where it is located within Sage CRM, enabling them to provide a consistent and excellent customer service at all times.

The interactive dashboard can be configured to display relevant information from within Sage CRM, including feeds from websites and information from your Sage ERP solution.

Users can choose to use the pre-installed customer service dashboard available out-of-the-box, or personalize their own dashboard or team dashboard to create a workspace to suit their needs.

You can also create a company dashboard for specific key accounts to enable users to better serve their customers. With this interactive dashboard, the customer service team can monitor customer cases - all from the one workspace.



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Sage CRM



“We have integrated
our whole way of
doing business into
Sage CRM.”

Dennis LeVan,
IT Manager,
Thermo-Twin Industries,
Pennsylvania



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About Sage CRM

Over 14,000 small and medium sized companies across the globe use Sage CRM every day to accelerate sales, drive business productivity and make every customer interaction count. It is used by enterprising, growing companies seeking new ways to interact with customers, leverage the power of social media and take advantage of the latest mobile developments to further grow their business. When combined with Sage ERP, our customers enjoy better business insight, increased efficiencies and productivity, and gain a single, customer-centric view across their entire business. So whether you're just starting out or have already grown to several hundred employees, Sage CRM can help accelerate your business success.