info Newsletter
For SageCRM

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What's Inside

Headline News

Sage CRM and SageCRM.com were named as recipients of a 2007 CRM Excellence Award by Technology Marketing Corporation (TMC)'s *Customer Inter@ction Solutions*® magazine (www.cismag.com). The Eighth Annual CRM Excellence Awards were selected on the basis of winning products' capabilities to extend their value across the entire customer lifecycle.

SageCRM Marketing Power

SageCRM provides comprehensive marketing automation tools allowing you to gather detailed information about your prospects. You can use that information to launch personalized campaigns, track wins and losses associated with those campaigns, and much more. Let's take a closer look at the marketing functionality inherent in SageCRM and how it can help you meet your marketing goals.

Campaign Management

Ultimately, your marketing department's success is measured by the total number of leads generated, and by the quality and quantity of the prospects provided to your sales team. SageCRM helps you increase sales revenue by centralizing and streamlining all marketing tasks and by giving you the information you need to focus on the activities that provide the highest return.

SageCRM combines powerful marketing features that streamline tasks and allow you to focus on the activities that provide the highest return.

SageCRM makes it easy to create, use, and analyze campaigns. You can create multiple campaigns, with each campaign consisting of any number of phases or waves. Each wave may then consist of several activities. Each activity is a task designed to help you achieve the campaign objective. Activities might consist of creating invitations automatically via a mail merge, making a telemarketing follow-up call, and creating and sending an e-mail blast. You may add new wave activities at any time during the campaign.

Here's an example of the Campaign, Wave and Activity relationship: your goal for a Campaign might be to get people to visit your booth at an upcoming trade show. A Wave of that Campaign could be generating awareness. The activities under the Wave of generating awareness may be adding a page to your Web site with conference information, sending e-mail or postcard invitations to prospects, and making follow-up phone calls about the upcoming trade show and your participation in it.

SageCRM includes several predefined wave activity types that have an associated workflow with each activity type. For example, the activities External Mail Merge and External Telesales display a workflow button for Create File for External Use. Clicking on the workflow button initiates the export of your target list to a spreadsheet that might then be sent to a mailing house or external telemarketing agency for processing. The Internal Telesales activity type includes a workflow button Schedule Telesales, allowing you to schedule calls for a select number of users.

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DATAQUEST
EXTENDING YOUR BUSINESS MANAGEMENT SOLUTIONS

Tracking Your Return

Ultimately, you want to know what kind of return on investment your campaign has delivered. With SageCRM you can track the sales that occur as a result of a specific campaign. You can analyze each campaign and its overall effectiveness using budget versus cost comparisons. In addition to the overall campaign budget, SageCRM allows you to establish a budget for each wave of the campaign, and track actual time spent and cost incurred by wave. For example, you can determine the number of individual pieces of collateral materials that were sent out, how much time was spent on a lead from initial contact to final sale, and how many different contacts it took to generate a sale.

Key Attribute Profiling

The better you know your customers and prospects, the more precisely you can target your message to their needs and tastes.

With SageCRM you can define the key attributes important to your business and then collect and store these details about your customers and prospects. SageCRM Key Attribute Profiling enables you to build a detailed profile of your customers and prospects over the course of the relationship. Use these attributes to mine your database, selecting the companies, people, or leads most likely to find your message of interest. Include these attributes in your reports and queries to better understand what drives the company's business.

Using the trade show campaign example again, you might decide to set up key attributes to track specific product or service interests that you discuss with prospects at the show. You could then report on these interests to tailor future marketing campaigns toward these interests.

List Management

The SageCRM Target List functionality gives you the ability to create, modify, and save lists of people, companies, or leads based on criteria you define. Your criteria can be broad, such as all companies in a particular state, or narrow, such as distributors in the state of Tennessee with revenues over a certain amount. You can even define the sort order of how your list is displayed and include Key Attributes in your selection. You're able to exclude or add individual members to your list at any time. Once you've defined the criteria for your targeted list's members you can create documents, send e-mail messages, schedule tasks, and more.

Companies recognize that marketing lists are valuable assets. With SageCRM you can capitalize on this asset. Save the list and re-use successful campaign lists. You even can import purchased lists. Built-in mail merge functionality allows you to merge various marketing documents with your targeted customer lists.

E-mail Management

E-mail is a preferred marketing communication method by many companies, and SageCRM makes it easy to distribute mass e-mail. Use one of the many global templates, modifying an existing template to suit your needs, or design a completely custom e-mail template. Send HTML e-mail and include attachments with your e-mail messages. E-mail messages sent by SageCRM are stored in each person's history, ensuring that you have a complete record of your communications.

Outbound Call Management

Traditional outbound marketing calls still have real value for many organizations. The Outbound Call Management feature within SageCRM is tailored to high-volume telemarketing units working from lists. Calls are not pre-allocated to individual users and a communications record is only created when a successful contact is made. This feature makes it easy to schedule follow-up calls at times convenient for your prospects or customers.

By dynamically allocating calls to your telemarketing staff as they become available, users' personal task lists are not burdened by hundreds of campaign-based scheduled calls, and a particular user's call won't be overlooked if that individual is out ill or on vacation.

It is possible to integrate your phone system with SageCRM using the computer telephone interface or CTI feature. CTI will automatically dial your customers when you click on their phone number within the system and it will display your customer profile when they call.

Marketing Evaluation Tools

The robust reporting engine within SageCRM ensures the data you've collected is easily accessible. Budget versus cost analyses are easily created, allowing you to focus your energy and resources on the activities that pay off. You can view the status of your campaigns at any time and analyze those campaigns by lead source or other details.

It's an easy task to design, build, and track campaigns within SageCRM. Your marketing team can analyze demographic information, allowing them to launch targeted direct marketing campaigns. Marketing managers can assign, schedule, and track various marketing activities within a campaign. Keep the history of each campaign to allow you to replicate successes and refine those campaigns that did not deliver.

Central Communications Portal

With SageCRM you can track all marketing communications in one centralized location. By giving everyone access to notes and actual documents sent to or received from your prospects, you can ensure everyone is working from the same information. In this way you provide clear, consistent communication with your customers and prospects — inspiring confidence in and loyalty to your organization.

Marketing success increases with greater understanding of your marketplace, your prospects, and your customers—and information leads to this understanding. SageCRM collects and stores the information that anyone responsible for marketing needs to launch successful campaigns, generate leads, monitor budgets, track campaign performance, and capitalize on feedback. Call us for more information about the marketing power of SageCRM. ☆

SageCRM Dashboards Drive Productivity

Making effective, timely business decisions requires access to real-time performance indicators at all levels of your organization. SageCRM Dashboards provide an effective, user-friendly way to provide those performance indicators to your staff. What's more, Dashboards are configurable to show tasks and appointments making them an ideal starting point for all members of your staff. Let's learn more about the ways you can put Dashboards to work in your organization.

Customizable By User

Each user can create their own Dashboard, truly tailored to present the information they need, and to provide access to the tasks they use most. Choose from a wide variety of available content for your Dashboard, including Leads Generated by Source, Team Cases by Stage, Revenue by Territory, and dozens more. You can elect to present your Dashboard content in either a two or three column layout, depending on the quantity of data you want to include and your own personal preference.

Users can save frequently used reports to their Dashboard making them easy to find and use. You can even save the same report to multiple Dashboards.

As Many As You Need

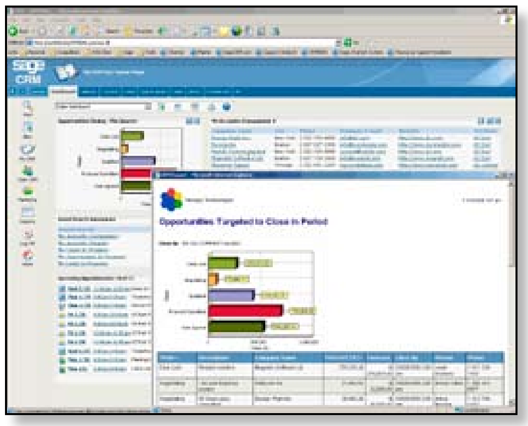
Why settle for a single Dashboard when you can tailor unique Dashboards to meet your various duties and roles? For example, you may want to create a year-end or month-end Dashboard to shows tasks and metrics pertinent to these busy times. Sales managers can have one Dashboard to help them monitor and review their team's daily activities and another to provide the charts and overall performance metrics needed for management reporting.

Standard Default Templates

Your System Administrator can set up a Standard Dashboard for various user profiles —sales, marketing, and customer service for example. You won't have to establish a new Dashboard for each new user. New users will get the associated Standard Dashboard along with their profile settings such as language and security. This makes system administration much easier and will speed and simplify new user setup.

Copy Templates

You can use an existing Dashboard as a template to create new ones, making it a quick and easy task to create as many Dashboards as you need. For example, set up separate templates for your support personnel on the West Coast and the East Coast using the appropriate time zone for each.



SageCRM Dashboards bring together the information you rely on in one location.

Play Favorites

All the reports that a user flags as My Favorite and every custom Saved Search can be included on the Dashboard for easy access. Tailoring the Dashboard to the specific tasks of each user allows them to be more productive and spend less time searching for frequently used resources.

Company Dashboard

Certain high-priority items deserve everyone's attention. Use the Company Dashboard to display important overview information such as a chart of overdue cases, a list of upcoming meetings, or high-profile opportunities. The Company Dashboard is available to all users with appropriate security permissions.

Ideas To Get You Thinking

Here are some examples of Dashboard data you might want to include for various users:

- Sales Representatives: Offer them a Daily Overview Dashboard containing Leads by Stage and Open Appointments. A quick to read, clear presentation of the data important to your representatives.
- Sales Manager: Include revenue-related information like Team Opportunities In Progress and Opportunities Closing This Quarter.
- Marketing Staff: Provide insight into marketing effectiveness by displaying Leads Generated by Source and Company Type by Territory.
- Customer Service Manager: Keep on top of open cases with information like High Priority Team Cases and Team Cases by Stage.

Enhance Productivity

To maximize productivity and ensure the best customer service, your employees need access to the most up-to-date information. The Sage CRM Dashboard drives that critical information directly to your staff's desktops. This enables them to do their jobs better and with added efficiency.

Call us for more information or assistance using the SageCRM Dashboard features in your organization. ☆

Tips & Tricks

SageCRM v6 SP1 has been released. Two sets of files are available: a patch to upgrade existing SageCRM v6 installations, and a full install set for upgrading existing SageCRM v5.7 or v5.8 installations or for new installations.

Issues addressed in this release include:

- Installations utilizing IBM DB2 as the database
- User Activity Logs—Large Installations
- Upgrading from SageCRMv5.7 Patch P
- Upgrading from SageCRMv5.8 when using an Oracle 10 database
- Outlook synchronization—time zone awareness
- Moving territories
- Security issues when creating Groups
- Mail Merge

Call us for further details of this release and for installation assistance. ☆

In The Spotlight
CRM Deployment Strategies

According to a recent Gartner survey, more than 80 percent of IT initiatives fail to produce the anticipated return on investment. While that's a discouraging-sounding statistic, many experts agree that one of the major reasons for this is that companies wait too long to deploy a solution, hoping to achieve perfection. A more dependable return will come when companies embrace realistic goals and deploy solutions capable of meeting those goals. Here are some tips to help make sure you reap the expected return on investment and have a successful CRM (customer relationship management) implementation.

Manage Expectations

Get expert advice about what your CRM solution can do and what it cannot. Plan your implementation carefully and set realistic goals. Manage expectations across your organization—among managers and your sales, marketing, and support teams throughout the process. Send regular project updates to users and management to keep everyone in the loop.

Make certain that your communications are accurate and realistic; overselling the solution or promising what you cannot deliver will undermine the project's success. Be certain you can deliver on the project goals—even if it means setting your sights on a less comprehensive goal.

Involve Users Early

We encourage you to involve people from departments across the company in the decision-making process and then put the software in their hands early on to test and experiment with. Roadblocks or other delays discovered early are often easily overcome.

A test environment where users can be trained, practice, and experiment is very helpful. Users will quickly tell you what's working and what's not—and this early feedback allows you to make slight course changes before you've headed too far in the wrong direction. A key factor in a successful CRM project is the involvement of your users in the design criteria and implementation process. Too often management leaves the ultimate users of the system out of the decision-making process only to discover the solution lacks critical, or perhaps simply convenient, time-saving features that could have been factored in easily at the outset.

Maintain Momentum

Consider rolling out CRM in phases—perhaps sales, then marketing, followed by customer support. Build on your success by gaining champions who have experienced the benefits of CRM.

By deploying a solution in manageable stages you can begin seeing benefits sooner and start gaining momentum. Take advantage of the momentum within the organization and among senior management by delivering your CRM solution on schedule.

Downside Of Waiting

While it is recommended that you take the time to set out your goals for the system and make your implementation plans, delaying your implementation too long can spell disaster. When projects are delayed too long, management and even your staff can lose confidence. Resources and priorities may shift in response to other pressures or other initiatives. The time, effort, and expense spent on the planning of your project may be wasted.

Start Reaping The Benefits Now

Companies aren't perfect. People aren't perfect. Even a CRM solution isn't perfect. Understanding that, you can work the system to begin generating the maximum return on investment in the minimum amount of time.

If you've been hesitant to move forward with your company's CRM initiative, we'd be pleased to discuss the process with you, share our experience and expertise, and help set you on the path to a successful CRM implementation. ☆

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