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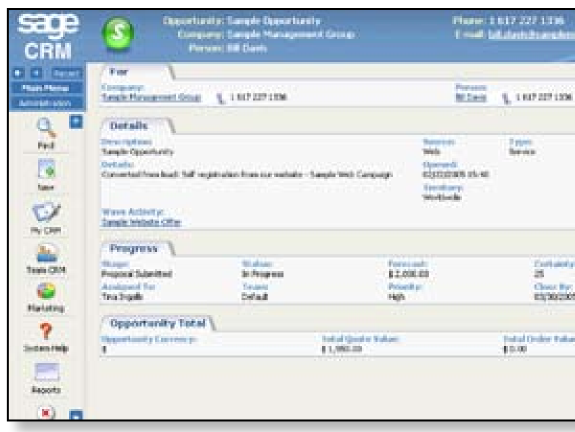
info Newsletter
For SageCRM

Managing Your Sales Cycle For Success

Managing the sales cycle, from lead through opportunity and on to closing is arguably the most important job within a company. However your leads are generated, if they are not followed up on and moved through the sales cycle, your company is likely to falter. Beyond mere survival, those companies that master the sales cycle, produce consistent results and have a significant competitive edge. How can you ensure that your company is managing its sales cycle for success? One way is to utilize the SageCRM sales force automation (SFA) tools. In this article we'll take a high-level look at the SFA features and functionality within SageCRM and show you how you can put them to work to manage your organization's sales cycle.



With SageCRM, you have access to the tools that allow you to become a highly effective sales organization.

Managing The Pipeline

When you think about your company's sales pipeline, is it the quantity or the quality of the leads and opportunities that matters most? The cost of leads is often high, and the cost of pursuing each lead is higher still. Therefore, it makes sense to focus on the quality of your leads and how you can most effectively move those leads through the sales cycle.

SageCRM provides sales teams with the tools to focus their energies on the leads and opportunities with the highest probability of closing, and to work those leads and opportunities in a thorough and consistent manner.

SageCRM differentiates between Leads and Opportunities. This differentiation means you don't clutter your opportunity database with hundreds or even thousands of unqualified leads. You decide when and if to promote a Lead to an Opportunity.

You can monitor the stage, priority, value, close-probability, and track the progression of each Opportunity through the various stages of your sales cycle. Every e-mail, meeting, or task associated with the Opportunity is stored within SageCRM to provide a comprehensive history of the sales cycle. You can record detailed notes that SageCRM automatically stamps with the date and user ID.

In SageCRM, generating quotes associated with Opportunities is simple, as is promoting Quotes to Orders. The history SageCRM main-

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What's Inside

Headline News

SageCRM v6 received Info-Tech Research Group's **Decision Diamond Award** for CRM market leadership. Info-Tech Research Group's Decision Diamond assessments position SageCRM as a Small Enterprise CRM category leader based on evaluation criteria including ease-of-use, features, architecture, support and pricing, vendor viability, and strategy.

SageCRM Mobile Access
See page 4 for more info!

tains allows purchase patterns and sales performance to become clear.

Define Your Sales Process

It is important to define your sales processes; longer sales cycles, stiffer competition, and staff turnover can cause your sales cycle to lose its momentum if not closely defined and tracked.

SageCRM allows you to define custom Workflows associated with each stage of your sales cycle. Think of a Workflow as a flow chart your sales representatives can follow as they bring a lead through the sales cycle. Several predefined Workflows are included in SageCRM—you may use them as-is or modify them to suit your business needs.

The Workflow consists of actions to be taken at particular stages, such as generating a letter, assigning a representative, producing a quotation, or making a phone call. While your representatives are working with an Opportunity, the Workflow actions specific to the Opportunity's stage are presented as on-screen options, making them simple to execute and track. For example, while an opportunity is at the Lead stage, Workflow actions might consist of qualifying the lead, submitting a proposal, or reassigning to another representative.

A Workflow rule can be applied to opportunities to automatically generate a follow-up call for the user every time a quotation is sent out. Or, a Workflow rule can be configured to send an e-mail to a sales representative each time a new lead is assigned to him or her.

When a sales cycle is not proceeding according to your rules, SageCRM can notify you through the use of Escalation rules. Escalation rules allow you to define a specific action taken in response to a specific situation, triggered when a deviation is found in your Workflow. For example, an Escalation rule could be configured to send an e-mail notification to the sales manager if the sales cycle stage for a particular Opportunity has not changed in 30 days.

Here are a few of the ways SageCRM Workflows can help you automate your sales processes:

- Prompt users to complete information that is relevant to the current stage of the business process.
- Create tasks for follow-up.
- Display Help prompts relevant to the current stage of the process.
- Follow escalation paths if the set processes are deviated from.
- Populate fields based on rules and events triggered elsewhere in the system.
- Send e-mail or text messages as notification reminders.
- Define branching Workflow paths dependant on Company or Team membership or other criteria.

Centralize Information

How much duplication of effort occurs in your organization? Are your representatives each maintaining their own contact lists, opportunity spreadsheets, price tables? With dozens of individuals' calendars to consider, how long does it take to schedule a meeting of your sales department?

Highly-effective sales organizations recognize the power of a centralized location for all sales-related information. When each individual has access to the latest information in a single, centralized database they are more efficient, more focused, and more effective in their jobs.

SageCRM provides a central repository of information on your accounts, contacts, and opportunities, accessible over the Internet from anywhere in the world. Thanks to a tight interface with Outlook, all e-mail communication between your staff and your contacts and accounts is stored within SageCRM. Every document you shared with them, every fax you sent, every phone call and meeting is recorded and available for everyone on the team to review.

When it's time for the sales meeting, the SageCRM calendaring features allow you to check the availability of all members of your team and send invitations and automated reminders to all attendees.

You can assign a Company, Opportunity, or Lead to a representative manually, or allow the assignment rules within SageCRM to automatically route leads to the relevant sales representatives based on the territories you've defined. As sales territories and staff shift and change, you're free to create new teams and reassign ownership of Company records, Opportunities, and Leads.

Forecast And Measure Effectiveness

How effective is your organization at promoting leads and closing opportunities? How productive is each of your sales representatives? How does this year's performance compare with last year's?

Highly effective sales organizations consistently forecast sales and measure their performance. Forecasting is a vital part of any organization—one that reaches beyond the sales department to impact staff utilization, production, purchasing, and more. In SageCRM, quarterly forecasts can be based on an individual's or a team's sales pipeline. You can use the pipeline as the basis for your forecasts, or select individual opportunities to include.

For each opportunity, you can note the forecast scenario: Commit, Likely, or Best Case. Sales representatives can save their forecasts and submit to their sales manager for review. Sales managers then can review their team's forecasts, make their own assessments based on the pipeline, and track individual results based on all the projections.

SageCRM tracks the changes and adjustments made to each forecast, allowing you to improve and perfect your organization's forecasts over time. Point-and-click reporting and graphs are provided, ensuring quick access to data for analysis and decision making.

Harness The Power

With SageCRM, you have access to the tools that allow you to become a highly effective sales organization. From initial lead through final sale, the intuitive, easy-to-use features and automated functionality of SageCRM allows your team to focus on their primary purpose—sales.

Call us for more information on the powerful SFA functionality in SageCRM. ☆

Becoming A Best-In-Class Sales Organization

The Aberdeen Group recently published a paper entitled *Sales Effectiveness: Getting Sales Back to Selling*. Based on its survey of 200 companies, the paper highlights the habits adopted by best-in-class companies, and contrasts those with the practices of average and laggard companies. We think it's worthwhile to summarize some of the findings of this paper with the goal of helping you improve the sales effectiveness of your organization.

Becoming A Best-In-Class Sales Organization

The Aberdeen Group used key performance indicators (KPI) to group the survey respondents into categories. The top 20 percent they refer to as ***Best-in-Class***, the middle 50 percent are labeled ***Average***, and the bottom 30 percent are called ***Laggard***. Here are the KPI statistics for the Best-in-Class group:

- 96 percent reported year-over-year improvements in Bid-to-Win performance
- 80 percent reported year-over-year improvements in Order/Quote Quality performance
- 86 percent reported year-over-year improvements in Lead-to-Opportunity conversion rate performance

What steps can you take to become a best-in-class sales organization? The Aberdeen Group made several suggestions, including the following:

Centralize And Eliminate Duplication

The paper noted that Best-in-Class sales organizations are working to eliminate spreadsheet-style and ad-hoc reports to track their sales process. Instead they turn to centralized and integrated systems for their sales management information. They recognize that with sales information scattered throughout the organization, residing in spreadsheets, databases, e-mails, or other software systems, you end up with *multiple versions of the truth*, and reconciling those versions takes time and effort away from the sales process.

Integrate Sales Processes With Back-Office Systems

A Best-in-Class company looks to minimize administrative overhead through integration of its sales and back-office systems. Sharing item pricing, orders, and quotes increase the effectiveness of its sales team and give them more time to focus on the job of selling.

SageCRM gives you the tools you need to become a *Best-in-Class* sales organization.

Invest In Formal Sales Methodologies

Due to its wide adoption, Contact Management software alone is no longer the competitive advantage it once was. To differentiate themselves from the competition the majority of the Best-in-Class sales organizations are moving to a formal sales methodology such as a feature-rich Customer Relationship Management (CRM) solution. The CRM solution you choose should provide: automated workflows to help ensure consistency; the ability to generate quotes and orders; sophisticated forecasting tools; and the ability to integrate with information tools such as Microsoft Outlook and Excel.

SageCRM is an ideal tool to help you become a Best-in-Class company. It provides a centralized database and helps you eliminate duplication, and is easily accessible by your entire team, wherever they may be working. SageCRM integrates with several back-office accounting solutions including: Sage Accpac ERP, Sage MAS 90 and MAS 200 ERP, and Sage MAS 500 ERP. To maximize your team's effectiveness, Sage CRM integrates with Microsoft Outlook and Excel. In addition, SageCRM allows you to configure workflows specific to your company's sales model.

Overcoming Obstacles To Sales Effectiveness

The Aberdeen Group paper identified two top pressures or challenges to increasing sales effectiveness based on its survey findings: longer sales cycles and low sales productivity.

To address these challenges, Best-in-Class firms are employing a number of different strategies. One strategy is to increase the sales representatives' use of information by improving their knowledge of products and customers. Another strategy is to deploy sales processes to help sales representatives leverage their product and customer knowledge, thereby shortening the sales cycles and increasing sales win rates.

SageCRM is a sophisticated tool that can help your organization overcome these challenges. With SageCRM, your sales representatives have ready access to a wealth of information related to account, contact, and opportunity records. Document handling features allow you to associate product manuals, price sheets, or white papers with an opportunity to ensure detailed product information is instantly available. A formally documented sales process facilitated by the workflow functionality in SageCRM helps shorten the sales cycle by ensuring a standard, consistent approach.

Learn More

The paper, ***Sales Effectiveness: Getting Sales Back to Selling***, by the Aberdeen Group is full of information and statistics; we've given just a brief summary here. If you'd like to receive a copy of the paper or learn more about SageCRM, please give us a call.

In The Spotlight
SageCRM Mobile Access

You've grown accustomed to having phone numbers, calendars, notes, and other bits of information on your mobile devices, but to be truly productive when you're away from the office, you need the ability to bring along the power of SageCRM. Now you can with SageCRM Mobile Access. It goes far beyond basic look-ups of information, enabling you to take advantage of full sales, marketing, and customer care functionality. Let's take a closer look.

Easy To Navigate

SageCRM Mobile Access is an easy-to-navigate solution that delivers real-time access to the SageCRM database. Users familiar with SageCRM will have no trouble using the intuitive screens. And virtually all of the functionality you and your team need on a daily basis can be accessed from your mobile device.

Complete Workflow

SageCRM Mobile Access is not a scaled-down version of SageCRM—it is SageCRM! You access your SageCRM database in real-time and have virtually all the functionality you have when accessing the software from your desktop. With SageCRM Mobile Access you can:

- Create and update SageCRM Company, Person, Opportunity, and Lead records.
- Search, sort, review, and create SageCRM Cases.
- Synchronize calendar, tasks, and e-mail with Microsoft Outlook.
- Access virtually any information available in the SageCRM database, including custom fields.
- Customize screens, lists, and tabs.
- Run any SageCRM report.
- Designate a SageCRM Dashboard for your mobile device.

Customize The Look

SageCRM Mobile Access includes default user interfaces for different types of mobile devices. However, you may want to further customize some areas. Of course, because the display on your mobile device is many times smaller than a standard monitor, it is important to optimize the user interface for the smaller screen size. For example, if you add too many fields to a PDA screen, it will look crowded and will be difficult to work with. Within those guidelines, though, you are free to customize the screens, lists, and tabs in much the same way you perform those customizations in SageCRM.

Significant Return On Investment

The ability to work with SageCRM from a mobile device increases its usability and maximizes your investment in your SageCRM solution.

There's a good chance that your sales representatives are already using a compatible handheld device—by using SageCRM Mobile Access you're maximizing that investment as well.

With real-time access to the data they rely on, employees can be productive anywhere. Access to SageCRM while traveling or when out of the office increases your employees' productivity and performance rates. No longer will they need to call your in-house staff for answers to their customer-related questions.

Simplified Administration

No special software needs to be installed on your handheld or mobile devices; they will access SageCRM remotely. Set up is easy, you simply point the mobile device's browser to your company's SageCRM system and you're ready to work.

Supported Devices

In addition to all WAP-enabled mobile phones, the wireless SageCRM Mobile Access solution supports the Pocket PC HP iPAQ, BlackBerry, and any other mobile device with a browser that supports WML 1.1.

Want To Learn More?

Whether your team is in the office, on the road, or working from home, SageCRM Mobile Access allows them to be productive and efficient. Call us for full details of SageCRM Mobile Access. ☆

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