

# Sage CRM | for Marketing

## How can you plan, execute and measure your campaigns better?

An invaluable tool for marketers, Sage CRM helps you to plan, execute, and measure the success of every marketing campaign. It becomes easier to get the right messages to the right people at the right time, eliminating guesswork, and making the best use of your marketing resources.

Financial profiling, order information, purchase histories, special interests and demographics can all be used to create detailed profiles of customers and prospects for highly targeted campaign planning.

The more targeted your campaigns are, the more successful they will be. Sage CRM makes it easier to deliver targeted campaigns by providing your marketing team with detailed information drawn from across your business. Whether using your own campaign lists or imported mail house lists, executing campaigns has never been easier.

Sage CRM provides effective controls for monitoring marketing budget and can also calculate direct revenue yields. Reporting can help track the source of leads, assess opportunities and help focus on prospects that are more likely to purchase; therefore increasing ROI and maximising the marketing budget and spend. Highly graphical reports and charts can be displayed on the Interactive Dashboard for quick reference enabling users to analyse data in real-time.

### TOP 10 BENEFITS SNAPSHOT

1. Create, track and manage dynamic marketing campaigns that really deliver
2. Plan and track activities, tasks, budgets and details for each marketing activity
3. Produce highly targeted customer communications improving response rates
4. Leverage real-time marketing performance analysis
5. Use fully customisable marketing workflow out-of-the-box for rapid campaign execution
6. Execute email campaigns with Sage E-marketing for Sage CRM\* with pre-designed templates that cover all communication needs
7. Track all e-marketing email interactions including open, click and bounce rates automatically through Sage CRM
8. Maximise customer communications and interactions through integrated social media channels
9. Enjoy a great user experience on any Browser with cross-browser compatibility
10. Take advantage of pinpoint marketing budget management

The screenshot shows the Sage CRM interface for a campaign. The main content area is titled 'Campaign: TimeExpense Marketing Campaign' and displays the following details:

<b>Campaign Name:</b> TimeExpense Marketing Campaign	<b>Start:</b> 01/01/2012	<b>End:</b> 31/12/2012
<b>Status:</b> Active	<b>Campaign Budget:</b> \$ 10,600.00 € 10,745.06 @ 1 : 1.013685	<b>Actual Cost:</b> \$ 10,600.00 € 10,745.06 @ 1 : 1.013685

Below this, there are sections for 'Waves' and 'Wave Activities':

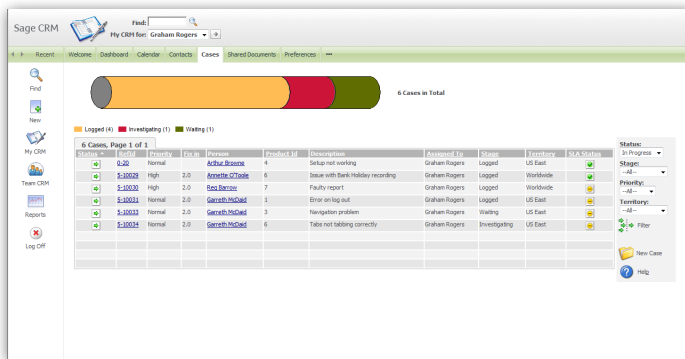
- Wave 1 - Awareness**
  - Wave Activities: Mailer to target companies, Follow up Mailer, PR - Initial Press Release, Internal Telemarketing Follow Up, Outsourced Telemarketing Follow Up
- Wave 2 - TimeExpense Conference Events**
  - Wave Activities: Teaser Mailshot - Part 1, Email Shot, Teaser Mailshot - Part 2, Advertising, Web Site Show Registration, TimeExpense Conference Stand, Show PR, Leaflets and Lollipops, Teaser Mailshot - Part 3
- Wave 3 - Industry Advertising**
  - Wave Activities: Ad in 'Expense Management Magazine', Ad in 'Expense Today', Insert in 'Business Travel' Magazine

The interface also includes a sidebar with navigation icons (Find, New, My CRM, Team CRM, Reports, Marketing, Log Off) and a right-hand panel with action buttons (Change, Delete, Response Setup, Continue, Clone Campaign, Hide Wave Activities, Show Analysis, Help, Cancel Activities (Campaign)).

- Sage CRM tracks and manages multi-channel marketing campaigns from lead to close of sales for maximum marketing effectiveness.

## Are you looking for total campaign management?

Sage CRM's total campaign management functionality comes with workflow out-of-the-box. Organisations can therefore easily structure campaigns for consistent execution and marketing users can execute multi-channel activities with maximum reach and impact. With Sage CRM, every phase of every marketing campaign can be tracked to provide meaningful analysis and campaign measurement.



Case ID	Status	Priority	Assigned To	Description
E-10001	Normal	2.0	Ashley O'Toole	4 Setup not working
E-10002	High	2.0	Bob Basso	5 Issue with Bank Holiday recording
E-10003	High	2.0	Bob Basso	7 Faulty report
E-10004	Normal	2.0	Garath McSaid	1 Error on log out
E-10005	Normal	2.0	Garath McSaid	3 Navigation problem
E-10006	Normal	2.0	Garath McSaid	6 Tabs not tabbing correctly

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

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

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

Users can clone campaigns easily driving marketing-wide collaboration by enabling marketing users to share best practice within teams and re-create campaigns quickly. With user-friendly tools and highly graphical 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 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.

Users can also define a marketing budget which alerts them when they are running over budget for pinpoint budget management.

## Do you need to manage leads better?

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 and assigned to relevant team members to follow up or convert 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.

**“Sage CRM adds a new level of professionalism to our direct mail, telemarketing and email campaigns. The detailed reports we generate give us immediate results, so we can tweak a campaign for greater effectiveness. Our campaigns are at least 20 percent more successful due to Sage CRM.”**

**Tom Matheny,**  
Database Marketing Manager,  
Buffalo Sabres

## Do you need to be smarter with your marketing lists?

With Sage CRM it is possible to create targeted lists of prospects and customers that can be used for sales calls/maillings. Customer data and prospect lists can be segmented based on desired criteria such as interest or demographics via user-friendly tools. Sage CRM allows users to focus marketing efforts on prospects that are most likely to purchase, thereby increasing return on investment and maximising marketing budget and spend.

Sage CRM can be configured so that campaign responses trigger sub-lists for the next wave of the campaign, with successful responses moved to sales and non-responses kept on a reminder list (or removed if required).

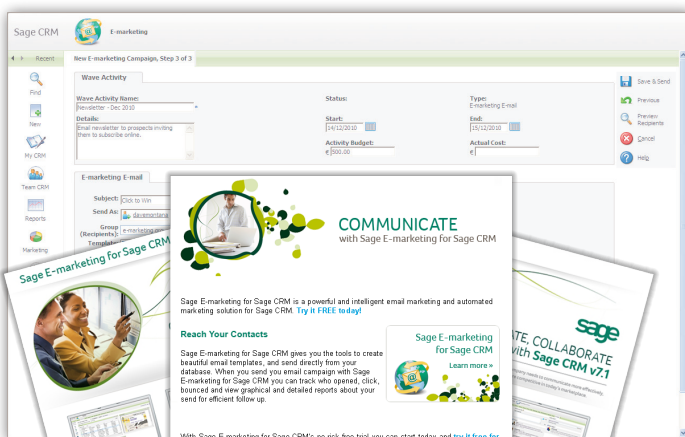
Marketing lists can be recorded for future reference and Sage CRM provides the option to re-use successful campaign lists or import mail house lists. Detailed profiles of customers and prospects over the course of the relationship can be created and this information can be stored, reported and segmented for future campaigns.

## What is Sage E-marketing for Sage CRM?

E-marketing is one of the most popular marketing communication methods favoured by companies today. However, the load and blast approach to e-marketing does not achieve the best results. Sage E-marketing for Sage CRM gives users the opportunity to gain new customers and get closer to existing customers without ever having to leave Sage CRM.

Sage E-marketing for Sage CRM delivers all the power of e-marketing software directly through Sage CRM for end-to-end marketing campaign management. With a library of over 90 highly designed templates, users can execute targeted email marketing campaigns and drip marketing campaigns to the right people at the right time for maximum impact.

Open, click and bounce rates are automatically tracked enabling users to calculate accurate RoI and deliver hot leads to the sales team. Please refer to the Sage E-marketing for Sage CRM Datasheet for more information.



- Users can benefit from a simple 3-step wizard to easily create new e-marketing campaigns with a choice of over 90 templates to get started immediately.

## How can you integrate social media with Sage CRM?

Combined with CRM, social media channels can make an immediate positive and accelerated impact on sales, marketing and customer service activities. The emergence of social media channels such as Twitter and LinkedIn® has changed the way that companies interact and engage with people (prospects/customers/media/industry); how they control what is said about them and how they are perceived by those groups.

Sage CRM integrates with key social media applications to enable users to engage with prospects and customers in a collaborative manner in order to generate leads, foster loyalty, build customer retention and increase revenue.

Out-of-the-box integration with LinkedIn® enables users to tap into the endless possibilities of social networking for instant knowledge about customers and prospects.

\*Sage E-marketing for Sage CRM requires an additional subscription.

Sage CRM for Twitter enables companies to manage their communications with prospects and customers directly from within Sage CRM. Thanks to the website gadget on the Sage CRM Interactive Dashboard, users can browse social media sites from within Sage CRM, removing the need for users to switch between applications.

Since adopting Sage CRM, Boomerang Media has become more efficient than ever.

“All the information that we process and require for our daily operation is now more organised which has really helped improve our business efficiency.”

Daniel Martinez,  
Product Manager,  
Boomerang Media

## Would you like front-to-back-office 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.

Integration between Sage CRM and ERP enables marketing staff to execute highly targeted campaigns based on customers' financial history and enables pinpoint measurement of marketing ROI.

## Do you need better reporting and analysis capability?

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. Alerts can be created to notify users when they are over budget for pinpoint and accurate budget management.

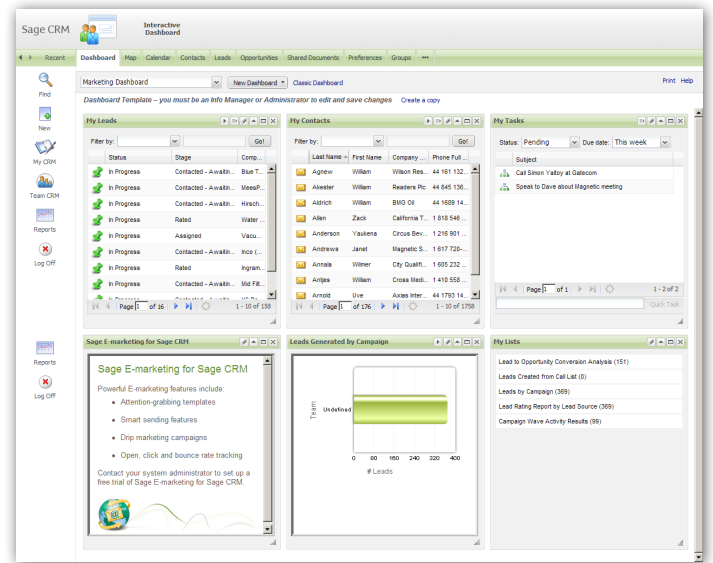
## What is the Interactive Dashboard in Sage CRM?

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 with content that is relevant to them and their role.

With the Interactive Dashboard, the marketing team can link to highly graphical reports and 3D charts 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.

## What is CTI Integration?

Sage CRM schedules calls for telemarketers and triggers follow-ups dependent on the outcome of the calls while the details of the call, such as length and results, are saved for cross-departmental future reference. In addition, CTI integration delivers advanced call automation and recognition tools providing telemarketers with the tools necessary for effective and efficient telemarketing campaigns.



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

## About Sage CRM

Sage CRM is used by over 12,000 organisations in 70 countries worldwide to manage their critical sales, marketing and customer service activities every day.

Sage CRM is optimised specifically for small and medium businesses. Easy to use and quick to deploy in the cloud or on-premise, it delivers a rapid return on investment so you see a positive impact on your business straight away. Plus, it can be easily adapted by you to make it fit how you work, saving you time and money, both now and in the future. In this way, we help you get the most from your CRM investment and accelerate your business growth.

Visit the Sage CRM Ecosystem at [www.sagecrm.com](http://www.sagecrm.com) to join the conversation on our user and partner communities and to access the Sage CRM Marketplace.

## The Sage Difference

- The leading supplier of CRM solutions to SMB organisations worldwide
- Over 6.3 million customers
- Over 3.1 million Sage CRM Solution users worldwide
- Over 13,400 employees
- Over 30,000 Sage-certified partners specialising in business applications
- Direct presence in 24 countries
- Relationships with over 40,000 accountancy practices
- 30 years experience

## Contact Details

Sage Business Solutions  
Level 6, 67 Albert Avenue  
Chatswood NSW 2067

[info.pacific@sage.com](mailto:info.pacific@sage.com)  
[www.sagebusiness.com.au](http://www.sagebusiness.com.au) | [www.sagebusiness.co.nz](http://www.sagebusiness.co.nz)  
Call **13 sage** (Australia) | 0800 904 409 (New Zealand)

