

Sage CRM version 6.2



Marketing Automation

Sage CRM provides powerful tools for marketing teams to plan, execute and audit highly targeted marketing campaigns. Easy-to-use, Sage CRM provides marketing users with the tools to target the right customer at the right time, eliminating guesswork and optimising marketing resources. With Sage CRM, users have the ability to assign and analyse marketing activities efficiently and easily. Integration with leading Sage accounting and ERP systems gives marketing staff the ability to create campaigns based on the financial profile, order information and purchase history of customers, and enables marketing managers to generate accurate RoI calculations for better marketing measurement.



Feature	Explanation	Benefits
Sage CRM enhancements/new features:		
Campaign Management	Sage CRM Marketing empowers users to view activities, objectives, leads and follow-ups, to drill down to specific activities including communications, opportunities, responses, budget, costs and prospects; managing and tracking every element of every marketing campaign.	Expedites campaign analysis, makes it easier and more automated to roll out marketing campaigns and creates good business practice going forward. Puts marketing resources to their best use as it delivers detailed information and eliminates guesswork.
Segmentation and Groups	Customer data and prospect lists can be segmented based on desired criteria such as interest or demographics via user-friendly tools. Marketing lists can be exported to Microsoft Excel if required.	Targeted messages can be delivered to select groups or target audiences.
Outbound Call Management	With Sage CRM it is possible to allocate and schedule target lists, calls and follow-up calls at times convenient for prospects and customers.	Integrates easily into any marketing campaign and shares call details for transparency and easy access across the company.
Email Management	Sage CRM Marketing provides the functionality to mass email efficiently with the ability to create email templates, send HTML and attachments as well as store communications per campaign.	Enables employees to review the exact email message received by a specific user or prospect. Sage CRM provides enhanced formatting options for emails including a multi-lingual spell checker.
Campaign Reporting	Track the success of individual or ongoing campaigns in real-time, at any stage in the campaign from the initial lead to the close and match sales revenues to specific campaigns.	Provides immediate cost versus sales analysis data and the ability to analyse marketing campaigns per lead source with user-friendly tools and reports.
Lead Management	With Sage CRM Marketing, leads can be qualified per selected criteria for follow-up and tracked at each stage in the process.	Ensures leads are visible to all team members, prioritised by management, have the appropriate team member assigned to them and are maximised at all times.

Outbound Call Management and Computer Telephony Integration (CTI)	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.	Provides telemarketers with the tools necessary for effective and efficient telemarketing campaigns.
List Building and Management	Multiple criteria may be selected to assemble lists. It is also possible to merge documents with target lists for mass mailings. Responses to campaigns can 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).	Records marketing lists for future reference and provides the option to re-use successful campaign lists or import mail house lists. Offers the tools to create detailed profiles of customers and prospects over the course of the relationship. This information can be stored, reported and segmented for future campaigns.
Campaign Evaluation Tools	Analyse marketing campaigns by lead source or evaluate other important campaign details by using sophisticated, user-friendly tools and reports. Sage CRM not only tracks response rates, it also permits the matching of sales revenues to specific campaigns.	Enables the status of campaigns to be viewed at any time to evaluate ongoing return on investment. Provides immediate cost versus sales analysis data. Enables management to determine marketing ROI.
ERP Integration	Marketing staff have access to financial information on customers, giving them the ability to create marketing lists based on financial profiles and target customers with good credit ratings and purchase histories. Return on marketing investment can be measured more accurately thanks to back office integration.	Enables marketing staff to execute highly targeted campaigns based on customers' financial history and enables pin-point measurement of marketing ROI.

With Sage CRM, every phase of every marketing campaign can be tracked to provide meaningful analysis and campaign measurement. Powerful and flexible profiling of customers and prospects based on criteria selected by the marketing team as well as direct integration to mass email and CTI functionality, makes Sage CRM for Marketing an invaluable tool for organisations and marketers.

Sage CRM for the Marketing Director

The Marketing Director is primarily responsible for developing the marketing strategy, management of the customer life-cycle and the total customer experience. A key task of the marketing director is to provide tangible metrics on customer profiling, marketing effectiveness and lifetime value of the customer.

Benefits of Sage CRM to the Marketing Director:

- Reduces marketing administrative overhead and enables marketing budget to be tracked and managed
- Enables marketing programmes to be planned more efficiently and effectively
- Improves marketing campaign response rate
- Produces highly targeted customer communications
- Enables fully integrated, multi-channel marketing initiatives
- Enables automated response tracking
- Leads to decreased cost per lead
- Leads to decreased cost per customer acquired
- Reduces marketing campaign lead times
- Delivers detailed information on the lifetime value of customers and enables profitable customers to be easily identified
- Enables real-time marketing performance analysis
- Optimises marketing spend
- Enables tracking of variance against targets
- Enables close alignment with the sales department and other key stakeholders
- Provides improved intelligence to marketing on lead generation activities
- Enables accurate measurement of marketing campaign ROI
- Ensures customers receive the right marketing message at the right time
- Ability to identify and provide customised products./services to different customer segments

Here is a round-up of questions which Marketing Directors and Executives have commonly raised in our consultations:

Question: *Leads are generated through many sources. How can we manage them effectively and ensure that they are all followed up accordingly.*

Answer: With Sage CRM, leads can be linked to existing companies or to new prospects. Full workflow management ensures that each lead is followed up accordingly. For example, once a lead is qualified, it can be converted to an opportunity. Leads can also be reassigned to ensure that they are followed up and actioned. They are visible to all members, prioritised by management, are assigned to a team member and are maximised at all times. Sage CRM provides users with a number of predefined reports to help analyse and track the source of leads and can be customised accordingly.

Question: *Carrying out segmentation and identifying suitable company candidates for marketing campaigns can be manually intensive.*

Answer: 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. Multiple criteria can be selected for segmentation purposes e.g. by area/customer type/size of company etc and these can then be exported to Microsoft Excel if required. Mass mail/email merges can then be carried out using those lists. Successful responses to a campaign can then be automatically allocated to the sales department while non-responses can be removed or recycled for future campaigns.

Question: *How can I identify who my most profitable customers are?*

Answer: Sage CRM provides users with key information about customers and prospects on desired criteria such as interest or demographics via user-friendly tools. Sage CRM and ERP integration allows marketing staff to leverage account information customers; enabling them to identify buying trends or suitable target segments.

Question: *It is difficult to analyse how effective marketing campaigns are and gain real insight into their actual performance so marketing strategies can be leveraged accordingly.*

Answer: 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.



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