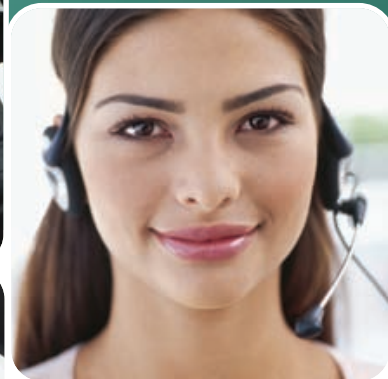


# Build Loyal Relationships

with Sage SalesLogix



[www.sagecrmsolutions.com](http://www.sagecrmsolutions.com)

# Acquire Retain Develop



Sage SalesLogix, an award-winning Customer Relationship Management (CRM) solution, provides a complete view of customer interactions across your entire organization—from sales and marketing to customer service and support—to help you acquire, retain, and develop profitable customer relationships. Whether your employees are conducting an in-person sales call, creating a marketing campaign, responding to a billing inquiry, or resolving service issues, they'll always have the information they need to perform their jobs effectively and deliver outstanding customer experiences.

With its easy-to-use, highly adoptable user interface, centralized customer information, flexible access methods, and extensive customization and integration capabilities, Sage SalesLogix can enable your organization to build and maintain meaningful, profitable relationships with your prospects and customers—enhancing the way you do business.

Sage SalesLogix delivers tangible benefits across your entire organization. Management is empowered with the information and tools they need to gain valuable business insights—facilitating timely, informed decisions. Team members have access to rich customer and prospect information and productivity tools so they can more effectively market to, sell to, and support your customers. And, Sage SalesLogix features a highly flexible open architecture, so you can easily tailor the solution to address your company's specific business needs and growth requirements.

## BENEFITS TO YOUR BUSINESS:

Build lasting, profitable relationships by maximizing the effectiveness of every customer interaction

Target the most profitable prospects, track all aspects of marketing campaigns in one place, and analyze campaign ROI

Automate key aspects of the selling cycle to increase productivity and maximize team selling effectiveness

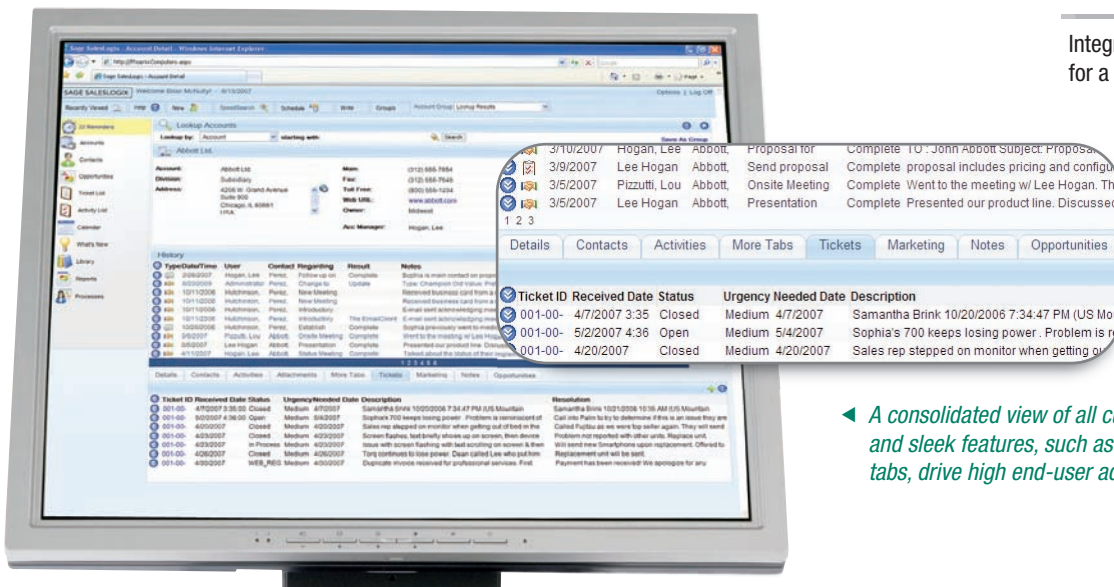
Resolve customer requests quickly and capitalize on new selling opportunities

Turn insight into action by identifying new opportunities, analyzing performance and business metrics, and diagnosing potential issues

Access vital customer information anytime, anywhere over the Web, Windows, or mobile devices

Customize your CRM solution to suit your unique business needs

Integrate with leading back-office solutions for a holistic customer view



◀ A consolidated view of all customer data and sleek features, such as moveable tabs, drive high end-user adoption.

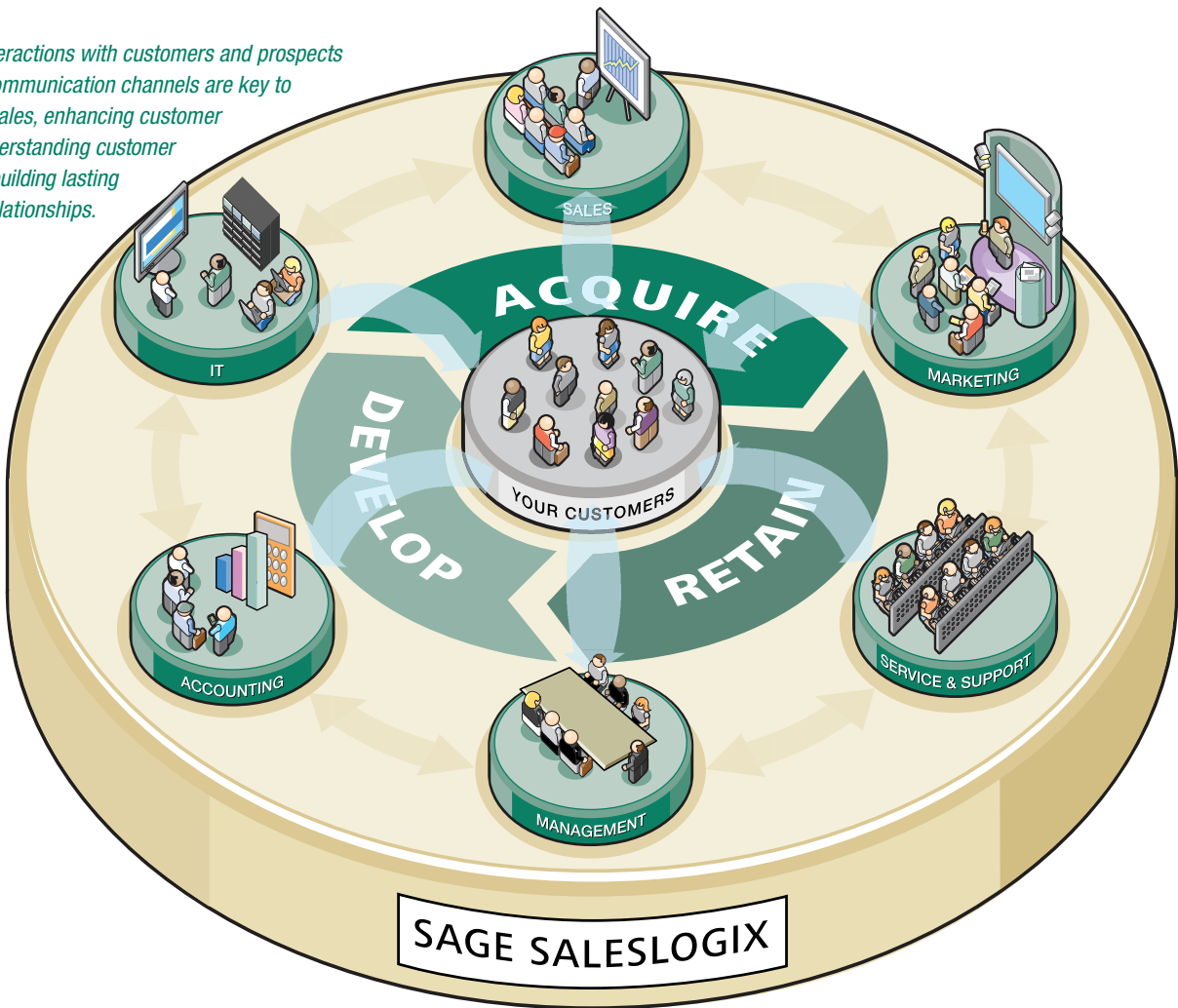
PRODUCT FEATURES AT-A-GLANCE

- Account, Contact, & Opportunity Management
- Calendar & Activity Management
- Advanced Lookups & Groups
- Microsoft Outlook and Office Integration
- Sales Process & Workflow Automation
- Sales Forecasting & Territory Alignment
- Interactive Reporting Dashboards

- Lead Qualification & Management
- Campaign Management & ROI
- Integrated E-mail Marketing
- Web Lead Capture
- Ticket Management
- Service Contract Management
- SpeedSearch KnowledgeBase
- Defect Tracking & Returns

- Customer Self-Service Web Portal
- Dynamic Business Alerts
- Web, Windows, and Mobile Access Methods
- Back-Office Integration
- Advanced Customization Capabilities

► Effective interactions with customers and prospects across all communication channels are key to increasing sales, enhancing customer service, understanding customer needs, and building lasting profitable relationships.



“Sage SalesLogix has enabled us to effectively communicate within our team and provide accurate and timely forecasts. With Sage SalesLogix, we are not only able to manage our growth more effectively, but we are better able to give current and potential clients the attention they need.”

**Charlie Schadewitz**  
Vice President of Sales, Uniscape, Inc.

# Improve Business Performance



## The Tools You Need

With its robust reporting and analytics, opportunity management, process automation, and consolidated customer data, Sage SalesLogix enables you to make profitable decisions, maximize selling effectiveness, and increase employee productivity. Powerful analytics and reporting capabilities give you a snapshot of the health of your organization—facilitating informed business decisions. Robust opportunity management and forecasting tools enable you to maximize selling effectiveness. Automating processes within Sage SalesLogix enables employees to be more productive—increasing efficiencies across your entire organization. As a single repository for vital customer data, managers and teams can make better business decisions and effectively sell to and service customers—ensuring your strength in the marketplace continues to grow.

## Make Informed Decisions With Customer and Business Insight

Making effective, timely business decisions requires access to performance indicators at all levels of your organization. Within Sage SalesLogix, interactive dashboards and customizable reports can help you view and analyze performance metrics—enabling you to quickly diagnose potential problems, resolve issues, and identify opportunities across sales, marketing, service, and support.

To gain insight into the health of the business, you need interactive, at-a-glance, business analytics tools that are easy to use. Sage SalesLogix Visual Analyzer delivers both pre-built and customizable

dashboard views of key customer and business data in Sage SalesLogix, which provides your organization the insight needed to manage your business more effectively. You can quickly view key performance indicators such as product sales trends, individual and territory sales performance, marketing campaign effectiveness, and customer service levels. View actual sales to date, goals, and deals in the pipeline to understand strengths and weaknesses and make adjustments accordingly.

Sales and marketing professionals can analyze the sales pipeline to concentrate efforts on profitable prospects and customers. Plus, customer service and support managers can view vital statistics such as open and in-process tickets and the average number of days it takes to close a ticket and immediately respond—strengthening customer loyalty and retention rates.

## Maximize Selling Effectiveness

Each new sales opportunity represents potential revenue for your company. To better manage opportunities in your sales pipeline, it's vital to track stages of a sales process, gauge the likelihood of closing the sale, and accurately forecast revenue. Sage SalesLogix industry-leading opportunity management can be tailored to your unique sales processes and enable your teams to work together to close deals faster by providing a single place for updating sales opportunity information, tracking opportunity milestones, and recording all opportunity related interactions. Quickly view opportunities in the pipeline to understand which deals have the largest potential and which opportunities are at a standstill—enabling you to concentrate sales and marketing efforts to close deals more quickly.

# The Tools You Need to Improve Business Performance

## SAGE SALESLOGIX ENABLES MANAGEMENT AND DECISION MAKERS TO:

- Increase the productivity of their workforce
- Easily get up-to-date, accurate reports of key business indicators

- Identify reasons for lost deals and stay on top of trends
- Analyze key performance indicators and take immediate action

## Boost Employee Productivity

Sage SalesLogix offers powerful process automation capabilities—enabling you to customize and automate business rules and processes across your entire organization to complement your internal methodologies. For example, your organization can implement proven standardized sales methodologies, or create custom sales processes based on product lines, deal size, or geographic region. You have the ability to automate processes, such as lead capture and distribution to the appropriate members of your team. In addition, auto e-mail responses can be defined for each situation to let prospects know you have received their inquiry. Once leads are assigned, your teams will be prompted to complete activities relating to the process—such as sending e-mails and brochures, writing letters, scheduling meetings, or making phone calls—ensuring all the steps are followed in a proven sales strategy.

You can also automate service ticket capture, distribution, and e-mail response to keep your customers apprised of their inquiry. With simplified sales, marketing, and service processes, your teams will not be bogged down by administrative tasks, so they'll have more time for prospecting, follow-ups, and building valuable customer relationships.

*“Overall, Sage SalesLogix has provided significant improvement in sales rep productivity with a 20 percent across-the-board time savings, as well as 23 hours-a-week time savings on reporting and forecasting from a business unit!”*

**Greg Stoner**  
Director of CRM Architecture, Avnet

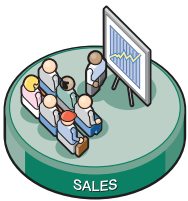
Sage SalesLogix further enhances employee productivity because it's easy to learn and use and integrates with the tools teams use every day, such as Microsoft Outlook. And, as a single point of entry of all customer data that everyone can access, employees can collaborate as a team and share vital customer information—responding to and addressing customer needs quickly and more effectively.



▲ Make fast, reliable business decisions with an eagle-eye view of performance data.



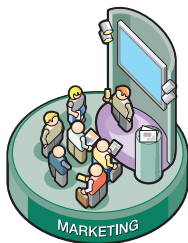
# Increase User Productivity



## Empower Your Sales Teams

With its powerful, easy-to-use interface, Sage SalesLogix is a single repository for information—enabling sales professionals to access detailed account and contact information; track opportunities from lead through close; manage calendars and activities; and forecast revenue. Seamless integration with common applications your teams use everyday, such as Microsoft Outlook and Microsoft Office enables users to share contacts, send e-mails, create personalized letters, and manage calendars from within Sage SalesLogix. Activities are recorded in the Sage SalesLogix account history for future reference.

With a consolidated view of customer information, sales teams are armed with the tools and resources they need to be successful at what they do. Users can view detailed information about each account or customer including opportunities, purchasing history, open tickets or issues, notes from past interactions, returns, personal information, and more—facilitating meaningful conversations that drive results.



## Target Profitable Prospects and Customers

Sage SalesLogix enables your marketing teams to segment customers and prospects to execute highly effective, targeted marketing campaigns. Execute multi-channel campaigns, such as



## Increase Customer Service and Loyalty

Stellar service and support is imperative to building lasting, profitable relationships with your customers and prospects—dramatically impacting your bottom line. Sage SalesLogix provides service and support personnel with advanced issue tracking and resolution tools as well as access to relevant customer data—such as products purchased, ticket and defect history, and maintenance contract status. Further enhance customer satisfaction by empowering your customers to find the answers they need 24/7 with the Sage SalesLogix Web Customer Portal—where they can view, add, or edit support tickets and access a rich support knowledge base.

*“The ability to have simultaneous views of up-to-date information has empowered our sales, customer service, and technical support groups to work more effectively as a team, regardless of location.”*

**Ken Coburn,**  
President, GoEngineering

# Increase Productivity Among All Users in Your Organization

## SAGE SALESLOGIX ENABLES YOUR EMPLOYEES TO:

- Increase productivity by automating common processes
- Increase sales success rates with anytime, anywhere access to vital customer data
- Execute effective, targeted marketing campaigns to customers and prospects
- Provide superior customer service levels



### Streamline Interactions with Accounting

Integration between Sage SalesLogix and back-office solutions, such as accounting software, enables everyone in your organization—from sales and marketing to accounting and finance to support and shipping—to work together efficiently to build profitable customer relationships. Your teams will have access to the most current product information, pricing, discounts, and inventory when they're creating quotes, taking orders, or billing customers. And, without having to leave Sage SalesLogix, they can view all relevant customer data, such as credit status, terms, and account balance—streamlining workflow and enabling higher levels of customer service.

### Anytime, Anywhere Access

Access to customer data, whether in the office or on the go, is critical to increasing sales and customer service levels. Sage SalesLogix enables your employees to select the deployment method that best suits their needs, without sacrificing functionality, usability, or robust customization capabilities. Users can work over a network, online via the Web, synchronize rapidly and work offline, or use popular mobile devices such as PocketPC, BlackBerry, and Smartphones for instant access to information and accounts while on the go.

With Sage SalesLogix Mobile your mobile workforce can view, edit, and add contact and account details, take notes, schedule meetings, complete activities, update opportunities, and review tickets from their handheld devices. Even if your employees are away from the office, they can deliver the same customer experience with the ability to access pricing and product information and create and view customized charts—enhancing productivity and ensuring timely, effective customer service.



▲ Sage SalesLogix Mobile enables users to benefit from rich CRM functionality on the go

*“Sage SalesLogix has helped us achieve our goal of a client-centric organization. All of our activities are focused around, and driven by, our client relationships.”*

**Philip Angarone**  
Marketing Director at PMK Group



# Industry- Leading Future Growth



## Reduce Development Time and Lower TCO

Sage SalesLogix is built on a state-of-the-art, standards-based platform—enabling better integration and unparalleled customization capability in the industry. With a strong presence in over 80 industries, Sage SalesLogix has proven to be a platform that adapts to unique industry processes and requirements. You can tailor the design and functionality of Sage SalesLogix to mirror your distinctive customer acquisition, retention, and development processes—resulting in high user adoption levels and enhanced productivity. With Sage SalesLogix, you can develop and deploy customizations across all areas of the product using both coded and codeless tools. Advanced customizations can be accomplished using familiar standard development tools such as Visual Studio .NET. You can also easily create and bundle customizations as well as reduce development time and total cost of ownership (TCO) by re-using common customizations.

## Industry-Leading Customization Environment

Sage SalesLogix delivers an industry-leading integrated Web and mobile customization and development environment, which simplifies the process of creating and deploying customizations for each environment. In addition, developers or Sage SalesLogix business partners can isolate their customizations from the out-of-the-box business logic, enabling them to upgrade the application without rework to customizations or roll-out delays.



*“The greatest strengths of Sage SalesLogix are its flexibility and customization capabilities. We were able to customize the system so that all of our crucial business processes are run through Sage SalesLogix—from literature fulfillment to sales and activity analysis. Through customization, all of our industry’s unique requirements are reflected in our automated processes, thus reducing or eliminating a chance of regulatory compliance problems.”*

**Constantine Blinkov,**  
Director of Business Infrastructure,  
CNL Investment Company

**SAGE SALESLOGIX ENABLES SYSTEM ADMINISTRATORS OR IT STAFF TO:**

- Tailor the solution to meet the unique and changing needs of your industry and organization across all Sage SalesLogix deployment methods
- Utilize a robust, standards-based architecture easily integrating into your existing IT environment and enabling future growth and expansion
- Easily configure the solution to extend functionality by linking to other internal systems

**Standards-Based for Future Growth**

Sage SalesLogix is built on a robust, standards-based architecture, including ASP.NET, AJAX, CAB, and Web services, easily integrating into your organization's existing IT environment and enabling future growth and expansion. Leverage the investments your organization makes in training staff on these technologies to deliver rapid customizations and immediate ROI.

**Peace of Mind**

Sage Software has developed an expert network of certified business partners that specialize in Sage SalesLogix implementation, support, training, and customization. Our Sage Business Partners are not only experts in implementing technology, but they also possess extensive knowledge of CRM best business practices—involving people, process, and technology. Whether you have a large IT staff or little or no IT support, you can have peace of mind that a Sage business partner will work closely with you on your CRM initiative each step of the way—from needs analysis, to design and implementation, to customization as your requirements grow and change.



**Award-winning Sage SalesLogix**

Sage SalesLogix is the CRM solution that enables businesses to acquire, retain, and develop profitable customer relationships by increasing sales and marketing performance and maximizing customer satisfaction and loyalty.



### About Sage SalesLogix

Award-winning Sage SalesLogix is the CRM solution that enables businesses to acquire, retain, and develop profitable customer relationships by increasing sales and marketing performance and maximizing customer satisfaction and loyalty. Sage SalesLogix delivers deep, rich customization capabilities, high levels of end-user adoption, and low total cost of ownership across all deployment methods including Web, Windows, and mobile devices. Sage SalesLogix provides organizations with the Freedom of Choice to select the access methods best suited for their teams, without sacrificing functionality, usability, or robust customization capabilities. Users can be more productive as they always experience the same rich user experience, regardless of application preference. With more than 300,000 users at over 8,500 companies worldwide, Sage SalesLogix is the leading CRM solution for small to midsize businesses and divisions of larger enterprises, and is part of the Sage Software family of integrated business management solutions.



Effective interactions with customers and prospects across all communication channels are key to increasing sales, enhancing customer service, understanding customer needs, and building lasting profitable relationships.



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09/07

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