

Sage SalesLogix

grow
your business
with Sage SalesLogix

sage

Acquire Retain Develop



OVERVIEW

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.

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—transforming 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 service your customers. And, Sage SalesLogix features a highly flexible open architecture, so you can modify the solution to address your company's specific business needs.

BENEFITS TO YOUR BUSINESS

Build profitable relationships by maximizing the effectiveness of customer interactions

Fill the sales pipeline with qualified leads that bring in consistent revenue

Identify new opportunities, analyze performance and business metrics, and diagnose potential issues

Access vital customer information anytime, anywhere—even while disconnected

Customize your CRM solution to suit your unique business needs

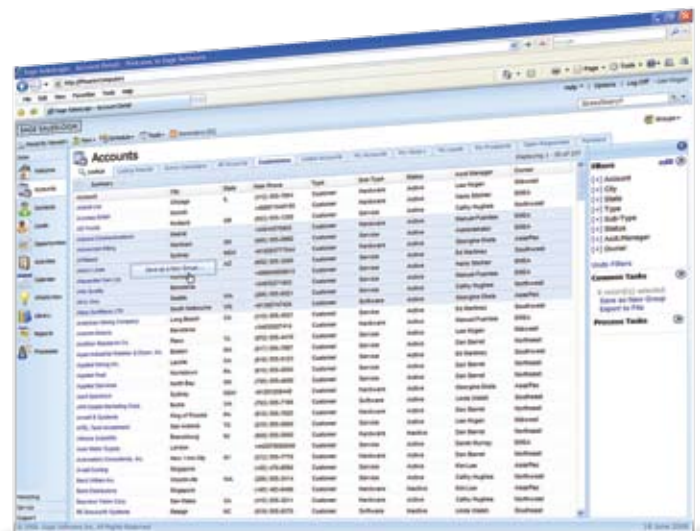
Integrate with leading back-office solutions for a holistic customer view

FEATURES AT-A-GLANCE

- Account, Contact, & Opportunity Management
- Calendar & Activity Management
- Microsoft Outlook and Office Integration
- Process & Workflow Automation
- Sales Forecasting & Territory Alignment
- Lead Qualification & Management
- Campaign Management & ROI
- Integrated E-mail Marketing
- Ticket Management
- Service Contract Management
- SpeedSearch KnowledgeBase
- Defect Tracking & Returns
- Customer Self-Service Web Portal
- Web, Windows, and Mobile Access Methods
- Disconnected Web Client
- Back-Office Integration
- Advanced Customization Capabilities
- Data Mashups Capabilities

“Sage SalesLogix has transformed the way we do business. Every opportunity is visible and accessible to everyone. We’ve got the facts right in front of us—there’s no hunting for a file folder or calling around to find an answer.”

Mike McGuire
Managing Partner and Vice President of Sales
Zink Foodservice Group.



- ◆ Customizable personal workspaces, right-click menus, drag and drop capabilities, and powerful list building capabilities make the Sage SalesLogix Web client easy to use.

Improve Business Performance

MANAGEMENT

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 your organization to maximize selling effectiveness. Automating processes within Sage SalesLogix enables employees to be more productive—increasing efficiencies across your entire organization. And, 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

“Sage SalesLogix has been a fundamental tool in the growth of our sales organization. The use of SalesLogix has been a key driver for managing pipelines and organizing our efforts from the individual to the sales organization as a whole. Personally, SalesLogix has helped increase my ability to manage reps, forecast performance, and to create and execute strategies.”

Ed Burke
Sales Manager
ScentAir Technologies

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.



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

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 your organization to concentrate sales and marketing efforts to close deals more quickly.

BOOST EMPLOYEE PRODUCTIVITY

Sage SalesLogix powerful process automation capabilities enable you to customize and automate business rules and processes across your entire organization to complement your internal methodologies. You can build powerful single-step processes that can leverage sophisticated conditional policies to automate common activities, such as lead routing. Or, create interactive goal-oriented processes with multiple steps and stages.

Increase sales and marketing efficiencies by automating lead capture and distribution to the appropriate members of your team. 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 implement proven standardized sales methodologies, or create custom sales processes based on product lines, deal size, or geographic region.

Increase customer service and support levels by automating service ticket capture, distribution, and e-mail responses to keep your customers apprised of their inquiry. With simplified sales, marketing, and customer 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.

BENEFITS: MANAGEMENT AND DECISION MAKERS

- Increase the productivity of their workforce through process automation
- Easily get up-to-date reports of key performance indicators and take immediate action
- Identify reasons for lost deals and stay on top of trends
- Increase customer service levels

Increase User Productivity



USERS

“Sage SalesLogix is a mature, sophisticated, stable product. While it is complex behind the scenes, it is easy to learn and easy to use.”

Bobby Jose
Chief Information Officer
Windy City Wire

EASY TO LEARN AND USE

Sage SalesLogix offers an easy-to-navigate interface—whether using Windows, Web, or Mobile clients—so your users quickly get up to speed and become more productive. Employees can take advantage of some of their favorite features they use in other applications like right mouse button and drag and drop capabilities improving user adoption. Customizable workspaces, powerful list building capabilities, and summary views bring critical information “front and center” so users are able to respond more quickly to customers or accomplish tasks to advance the business. Plus, you can integrate Sage SalesLogix with familiar applications such as Microsoft® Outlook® and Office, furthering end-user adoption.

EMPOWER SALES TEAMS

One-click access to important information and tools enables sales reps to track opportunities from lead through close; manage calendars and activities; and forecast revenue. Detailed account and customer information, including opportunities, purchasing history, open tickets or issues, notes from past interactions, returns, and more—facilitate meaningful conversations that drive results. Time saving features such as the ability to update multiple opportunities at once, quick list building capabilities, one-click access to important tasks and features, and customized views of information enable sales reps to be successful at what they do.

TARGET PROFITABLE PROSPECTS AND CUSTOMERS

Using your marketing budget and resources wisely means launching effective, timely marketing campaigns across all of your sales channels. Sage SalesLogix provides full-scale marketing campaign management capabilities, including powerful lead de-duplication and management, targeted customer segmentation, multi-channel marketing communications, budget and ROI tools, and business analytics tools—all designed to target your most profitable prospects and customers, shorten your sales cycle, and increase marketing efficiencies.

BENEFITS: USERS

- 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

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.

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. Your employees can access Sage SalesLogix Windows, Web, and Mobile clients from anytime, anywhere—even when disconnected—without sacrificing features or functionality.

Sage SalesLogix Mobile extends CRM capabilities to both BlackBerry® and Windows Mobile® devices, delivering rich CRM functionality with the real-time convenience of wireless. SalesLogix Mobile mirrors the familiar Sage SalesLogix interface which enables Account, Contact, Opportunity, Activity, product, and Ticket management so employees always have access to and can easily update the latest customer information, whether in the office or on the road.

Industry-leading Future Growth



IT STAFF

BENEFITS: SYSTEM ADMINISTRATORS OR IT STAFF

- Leverage administrator tools to manage your system with ease
- 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

EXPERIENCE A STATE-OF-THE-ART PLATFORM

Sage SalesLogix is built on a state-of-the-art, standards-based platform that integrates into your existing IT environment and offers unmatched 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.

Out of the box, Sage SalesLogix is a powerful CRM solution, but you can tailor the design to mirror your distinctive processes—resulting in high end-user adoption and enhanced productivity. Take advantage of codeless wizards and tools to accomplish customizations quickly and easily, ensuring low total cost of ownership. You can also customize your solution using standard development environments you're familiar with like Visual Studio .NET or leverage a Sage certified business partner that specializes in Sage SalesLogix implementation, support, training, and customization.

STREAMLINE ADMINISTRATION

Configure and manage Sage SalesLogix Clients—including remote users—using administrator tools. With single sign-on capability you're not burdened with setting up and maintaining user passwords. Benefit from a complete CRM solution out-of-the-box that's easy to install—or leverage an experienced Sage business partner to work with you every step of the way from implementation and support to training and advanced customizations. Use the Express Installer to get you up and running quickly. Or, easily deploy the newly redesigned comprehensive Web Client, which eliminates the need to manage software on numerous client machines—reducing administrative burdens on your IT department.




CHOOSE TECHNOLOGY THAT'S RIGHT FOR YOUR BUSINESS

Implement access methods that work best for your dynamic workforce and leverage technology you may already have in place like Microsoft® SQL® or Oracle database servers. You can also leverage the e-mail solution that you prefer, including Microsoft® Exchange, Microsoft® Outlook®, or Lotus Notes®.

When it comes to access options, flexibility is the key with an ever-changing, dynamic workforce. With Windows, Web, and mobile client deployment options on popular devices such as BlackBerry and Windows Mobile® (Pocket PC® and Smartphone®), users have access to complete Sage SalesLogix information, whether connected or disconnected, without sacrificing functionality, usability, or robust customizations.

PEACE OF MIND

Ensure data security on multiple levels so information is only accessible by those who have access to it, ensuring your data is well protected. With sophisticated security features such as field-level and role-based security by individual, team, or department; read/write and view only options; and a Web Client secured by HTTPS, you can be confident that your sensitive data is protected from internal and external threats. Additionally, your customer information is secured at the data layer—preventing anyone who doesn't have access from connecting to your database.




“With the great Help function within Sage SalesLogix, the awesome technical support, and the excellent assistance from our business partner, I am more confident in my administrative abilities everyday...I'm so impressed with how much we can do with Sage SalesLogix. I'm always thinking of more ways we can use it.”

Jo Ellen Lyons
Marketing Manager
Gantt Aviation

Market Leader

Sage SalesLogix continually wins awards for product excellence and customer satisfaction. Over 300,000 customers in over 9,000 companies worldwide chose Sage SalesLogix for its easy-to-use interface, flexible access methods, and customization and integration capabilities.





“In the year after we implemented Sage SalesLogix our revenue was up 17 percent. Conservatively we credit a full third of that increase—about \$1 million—to Sage SalesLogix. The system paid for itself in about three months... Sage SalesLogix helps us take care of our customers. When you take care of your customers, revenue takes care of itself.”

Tom Mitchell
Director of Technology Services
Bordner Installation Group Inc.

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About Sage SalesLogix

Your highest priority is to grow your business, and your business tools should help you achieve that goal. Sage SalesLogix provides a complete view of customer interactions across sales, marketing, customer service, and support so your teams can collaborate and respond promptly and knowledgeably to customer inquiries and opportunities. With flexible access options, powerful process automation capabilities, and a highly customizable platform, Sage SalesLogix is a comprehensive solution that will help you achieve stronger sales and a more successful business, now and into the future.

About Sage CRM Solutions

Sage CRM Solutions is a portfolio of market-leading applications consisting of ACT! by Sage, Sage CRM, and Sage SalesLogix. Over 63,500 organizations and 3.1 million users worldwide rely on Sage CRM Solutions to develop profitable, long-term business relationships.

Features may vary by client and by version.

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