



sage CRM

Overview Presentation

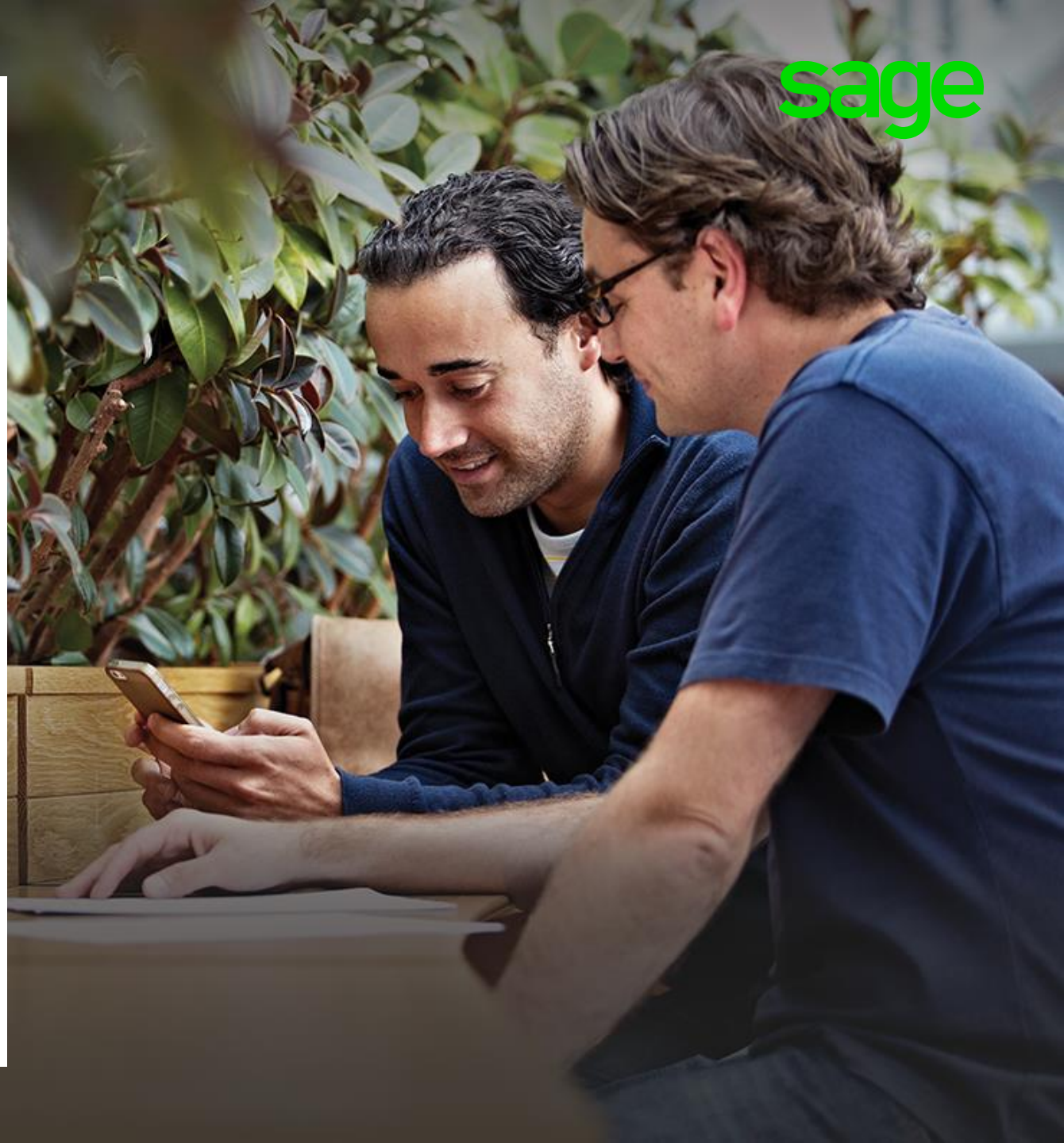
February 2017

- About Sage
- Why Sage?
- Introducing Sage CRM
- What makes Sage CRM different
- How Sage CRM can help your business grow
- Extend and adapt Sage CRM for your business
- Supporting management with valuable business insight
- Empower your team be more productive with Sage CRM
- Powerful tools to support your teams and drive productivity

What we do

Sage is the market leader for integrated accounting, payroll and payment systems, supporting the ambition of the world's entrepreneurs.

Sage began as a small business in the UK 35 years ago and over 13,000 colleagues now support millions of entrepreneurs across 23 countries as they power the global economy. We reinvent and simplify business accounting through brilliant technology, working with a thriving community of entrepreneurs, business owners, tradespeople, accountants, partners and developers. And as a FTSE 100 business, we are active in supporting our local communities and invest in making a real difference through the philanthropy of the Sage Foundation.



Key facts



Market



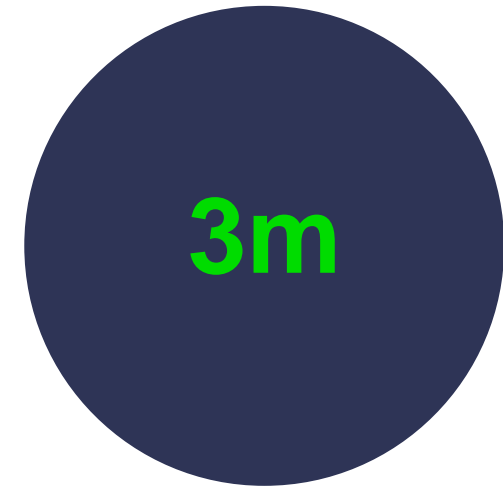
- One of the market leaders in North America, Europe, South Africa, Asia and Brazil
- Local presence in 23 countries globally

Finances



- Organic revenue growth of 6% for 2015 (2014: 5%)*
- Organic operating profit \$574m*
- Market capitalization of c.\$9.1bn*

Customers



- Supporting customers, managing over 30,000 calls each day
- Ecosystem including 100,000 accountants globally

* Data for financial year ending 30 September 2015
Group results converted at 1.51 USD:GBP, correct as at close of business 30 September, 2015

Our values

sage



Customers first

Our customers are at the heart of everything we do, they are why we are here and we wouldn't exist without them.



Velocity

We are agile and action orientated; we keep things simple, deliver at pace and over achieve.



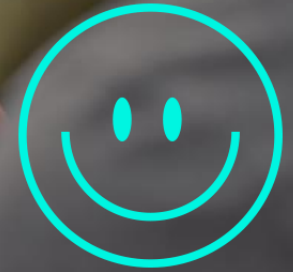
Do the right thing

Our colleagues are aligned and we trust each other to do the right thing to enable our customers to succeed.



Innovate

We create new ways of doing things and deliver innovative solutions which our customers need to help their businesses grow.



Make a difference

Sage is a great place to work and our colleagues make a positive difference to local communities by relentlessly supporting our customers and their businesses to be successful.

Our strategic pillars

sage



Customers for life

Regardless of product, location, and size we're passionate about our customers and want to serve them for life.



One Sage

We'll be one inclusive team of smart experts executing at pace and taking pride in putting our customers first and foremost.



Winning in the market

Our ambition is to be the market leader: creating value for customers, developing innovative products, thriving in uncharted territory.



Capacity for growth

Sage will be structured to best serve our customers: removing duplication of effort, simplifying processes, and working as one team.



Revolutionize business

We will not only meet our customers' needs, we'll change the game completely. The Sage ecosystem will be business' indispensable ally and the go-to source for advice.

Our software & support

Millions of the world's small and medium businesses trust us to help turn their dream business ideas into a way of life.

We are giving our customers the power to control their businesses from the palm of their hands, using the smartest technology to reinvent and simplify business accounting. We enable our customers to focus on their business and help them to leapfrog to the future.

We help our customers navigate the intricacies of business accounting by answering over 30,000 queries a day, by offering legislative guidance to all customers and by championing the causes that matter to them.



What we do



We help small and mid-sized organizations manage every aspect of their business.

We do this by offering business owners a selection of software and services that work together to:



Manage finances



Manage their entire business



Manage people and payroll



Manage customer expectations



Process payments



Run their business from the office or the road



Access support when they need it



Get business advice from experts and thought leaders



Introducing **sage** CRM

An easy-to-use, adaptable, insightful CRM solution

A world map with a glowing blue grid overlay. The map is dark blue, and the grid lines are light blue. The continents are labeled in white: NORTH AMERICA, SOUTH AMERICA, AFRICA, EUROPE, ASIA, and AUSTRALIA. The text 'sage CRM' is overlaid on the map. 'sage' is in green, and 'CRM' is in white.

sage CRM

Over 15,000 Customers

In 70 Countries

Across every industry vertical

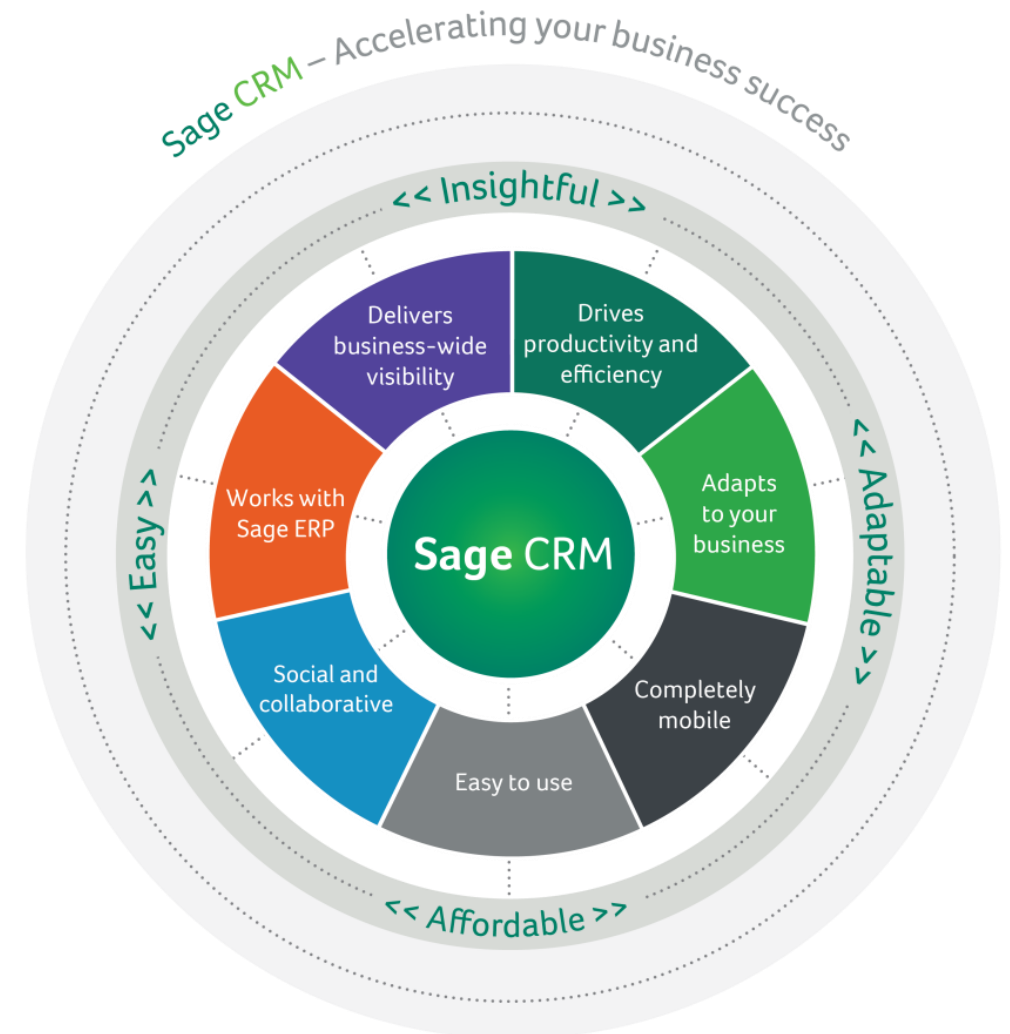
Designed for small and medium businesses



sage CRM

An affordable, adaptable and easy to use CRM solution designed with the needs of small and medium sized companies at its core.

Using Sage CRM our customers save time, increase productivity and gain greater visibility across the business for actionable decision making.



Gartner



A leading solution for sales organisations



“Sage CRM has strong SFA functionality, an intuitive UI and affordable pricing.”

What makes Sage CRM different?



With more than 6 million customers worldwide, we understand what today's companies need to be successful

YOUR CHALLENGE

- We recognise that the world you do business in is changing, and how you interact with customers and grow your business is changing too.
- You need more than just great sales, marketing and customer service to manage all your customer interactions and be successful.
- You need social interaction and collaboration; you need access anytime, anywhere; you need better business insight and you need maximum productivity and efficiency across your entire business.
- You need solutions that are as individual as your business, can adapt to your changing needs and that will grow as your business grows.

OUR COMMITMENT

- Sage CRM adapts to how you work, both now and in the future.
- It is easy to deploy, install, manage, learn and maintain for companies who want to focus on their business not on their software.
- Combined with Sage ERP, you can enjoy better business insight, greater efficiencies, increased productivity, and a single, customer-centric view across your entire business
- Sage CRM is affordable, so you can be assured you are getting the best possible value for money.

How CRM can help your business grow

An intuitive and easy to use CRM



Drive efficiency and work smarter and faster with an intuitive CRM solution.

Gain valuable business insight and see how your business is performing, and take corrective action when needed.

Improve sales forecasting accuracy and make critical sales assessments against your business KPIs.

Give your teams the tools they need to succeed and easily automate their key business processes to help them get their job done quickly and efficiently.

Sell smarter and accelerate sales team performance, never missing an important deal.

Work anywhere, anytime and gain access to up-to-date customer information and prepare for important meetings while on the road.

Collaborate effectively across teams and put processes in place that help everyone become more productive and efficient.

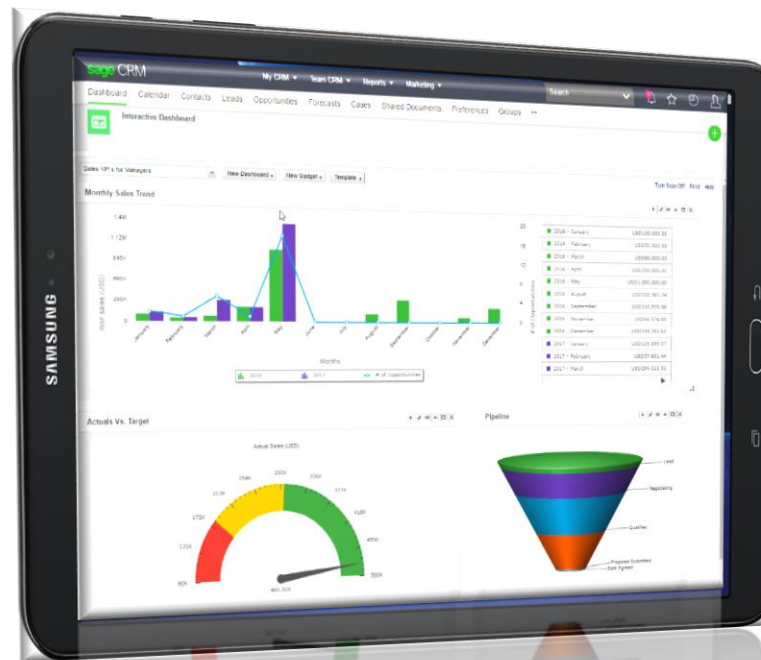
Adapt Sage CRM to suit your unique business needs now and in the future.

Know your business - Grow your business.



Sage CRM is an affordable, insightful and easy to use CRM solution that easily adapts to the needs of small and medium businesses.

A contemporary user experience and intuitive design boosts the productivity of everyone in your company, so they can focus on growing the business.



Sage CRM enhances your customer relationships by supporting your teams with a tool that can help them get their job done quickly and service customers efficiently.

With better insight, you know where your business stands and have the visibility to make the right decisions and grow your business.



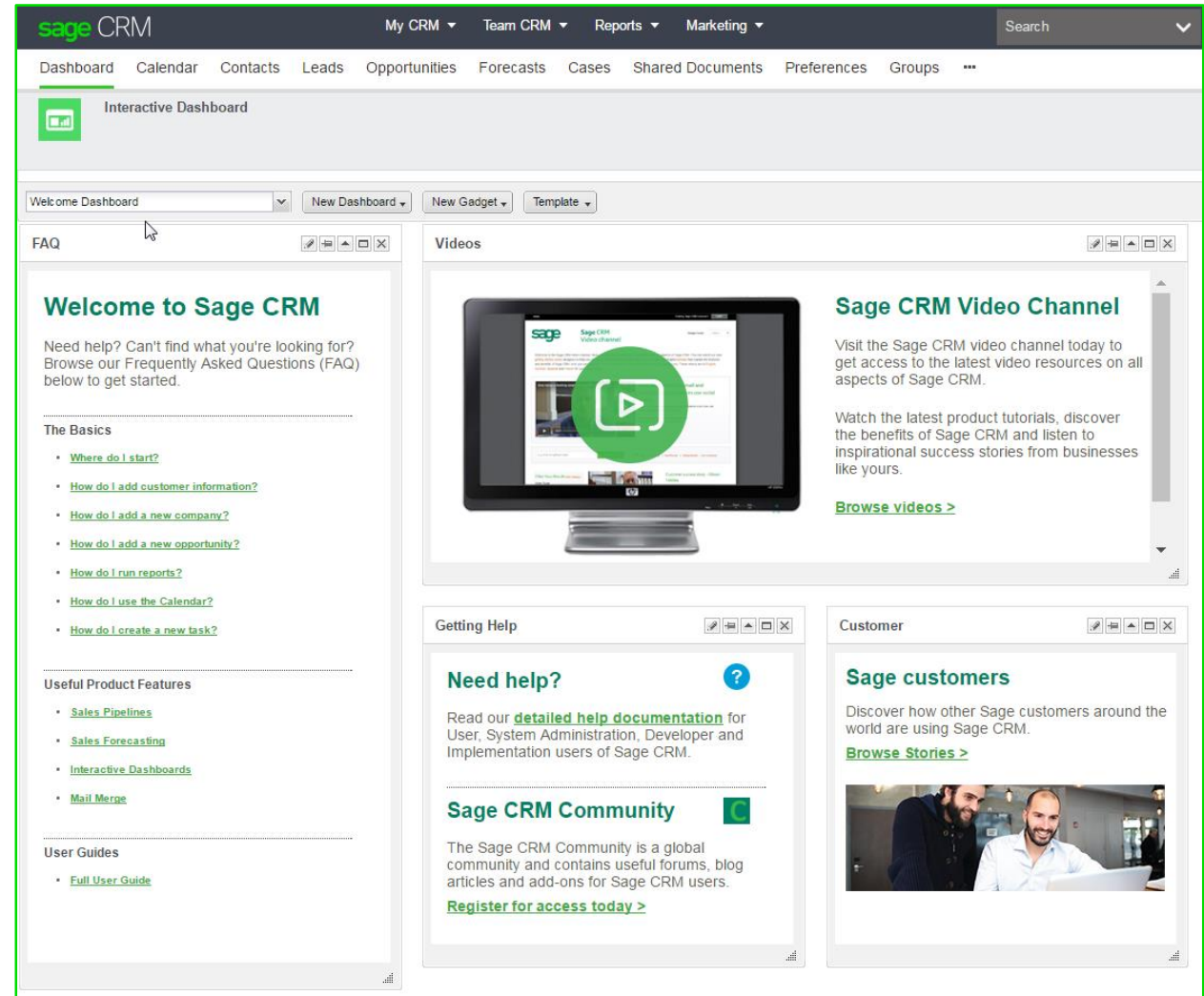
““Sage CRM drives efficiency which is the same as profitability for a business like ours. Information is king. It gives us a level of reporting and a snapshot of each aspect of the business with a level of detail we didn’t have before.”

*Jay Lentz,
Client Development Executive*

Intuitive CRM your teams will want to use



- Sage CRM is simple and easy to use, with an intuitive UI that is designed to help you be more productive and access all the information you need quickly and easily.
- An intuitive CRM solution for growing companies - you and your team can get started within minutes.
- Videos, tutorials, help guides and a contextual guided tour help you find your way around.
- Enables you to focus your efforts on closing the sale, growing your customer base and forging deeper relationships with your customers.





“The ease of use and flexibility of the system has allowed us to rapidly implement and evolve our sales model helping to contribute to a 240% year-on-year revenue growth.”

*Toby Pannell,
Managing Director*

Supporting managers with valuable
business insight

Supporting management with valuable business insight




- Real-time access to important information from across the business gives business owners and managers the information they need to make strategic business decisions.
- Get the most from your people with insight into your marketing, sales and customer service activities including the sales pipeline, marketing campaigns and RoI and customer service cases.
- Dedicated tools for managers deliver comprehensive sales-oriented data and insights designed to help you improve effectiveness and efficiency to drive revenue.



Supporting management with valuable business insight



- Generate a return on investment faster.
- Become more productive by automating key business processes.
- Make more informed business decisions.
- Monitor the performance of your teams in real-time.
- Gain quick insight into business performance so you can identify the areas that need your attention before it's too late.
- Create more strategic business plans for the future based on the performance of your business.
- Depend on a CRM solution helping over 15,000 small and medium sized businesses around the world.

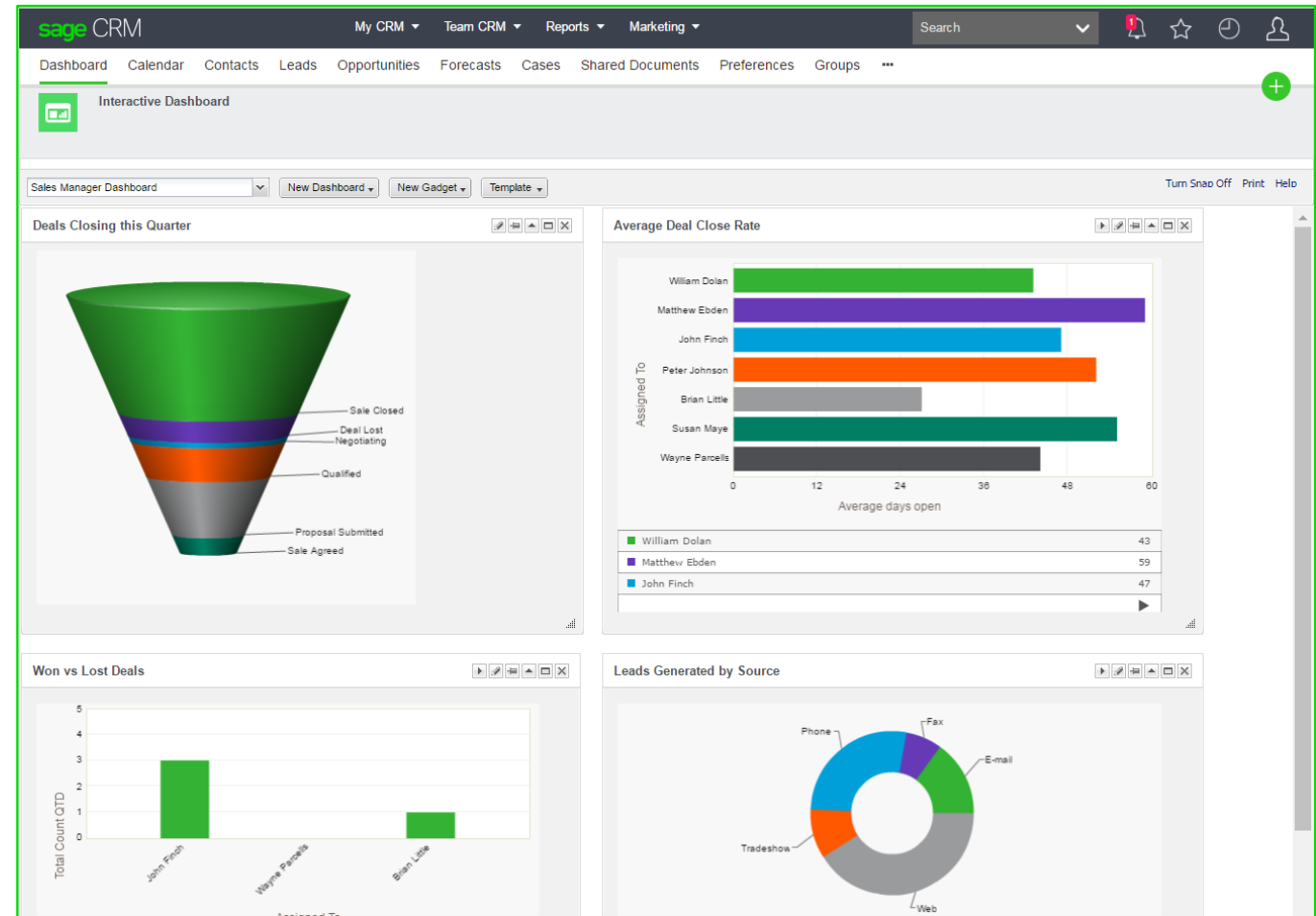
A large green circle with a thin white border, containing text about industry analyst backing.

These key benefits are backed up by key industry analysts like Forrester, Ovum and Info-Tech Research Group, who have independently reviewed and evaluated Sage CRM.

Evaluate how your business is performing in real-time



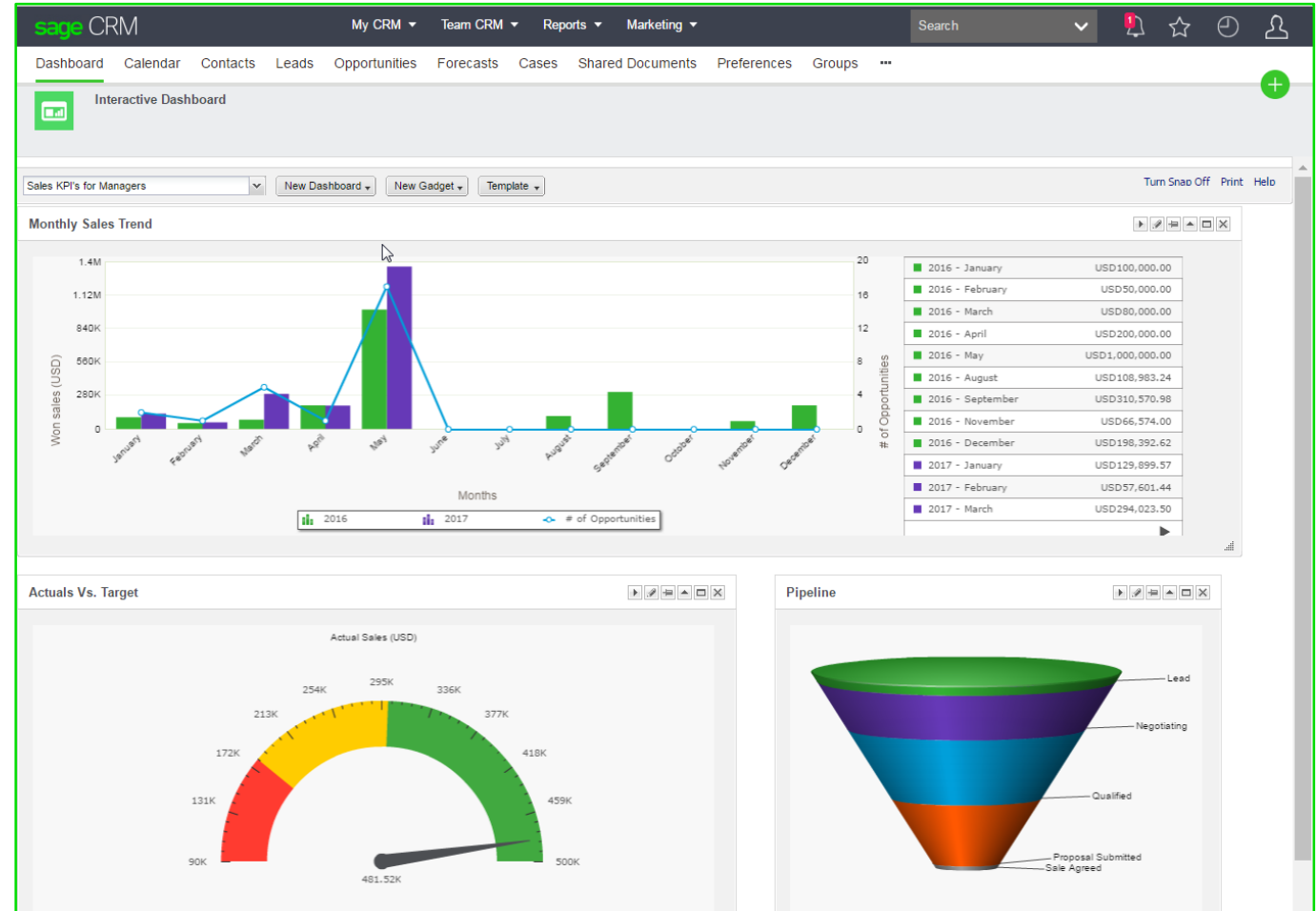
- Gain insight into key sales performance indicators so you can determine how effective your sales efforts are and what corrective action needs to be taken.
- Quickly assess how healthy your teams sales pipeline is for greater sales performance analysis. Gain insight into valuable information such as KPIs, sales performance, opened and closed sales, opportunities and forecasting data.
- Use this information to quickly create visual reports, for at-a-glance assessments, business insight and informed decision-making.



Business Accelerators for Sales



- Business Accelerators for Sales* offer comprehensive sales-oriented data and insights, built-in alerts, sales workflows, dashboards, sales performance charts and KPIs enabling better insight for actionable decision making.
- Management reports and dashboards provide at-a-glance insight into business performance through KPIs, comparisons and emerging trends.
- Preconfigured alerts and notifications help you and your sales managers get real-time updates on your business KPIs as they happen.





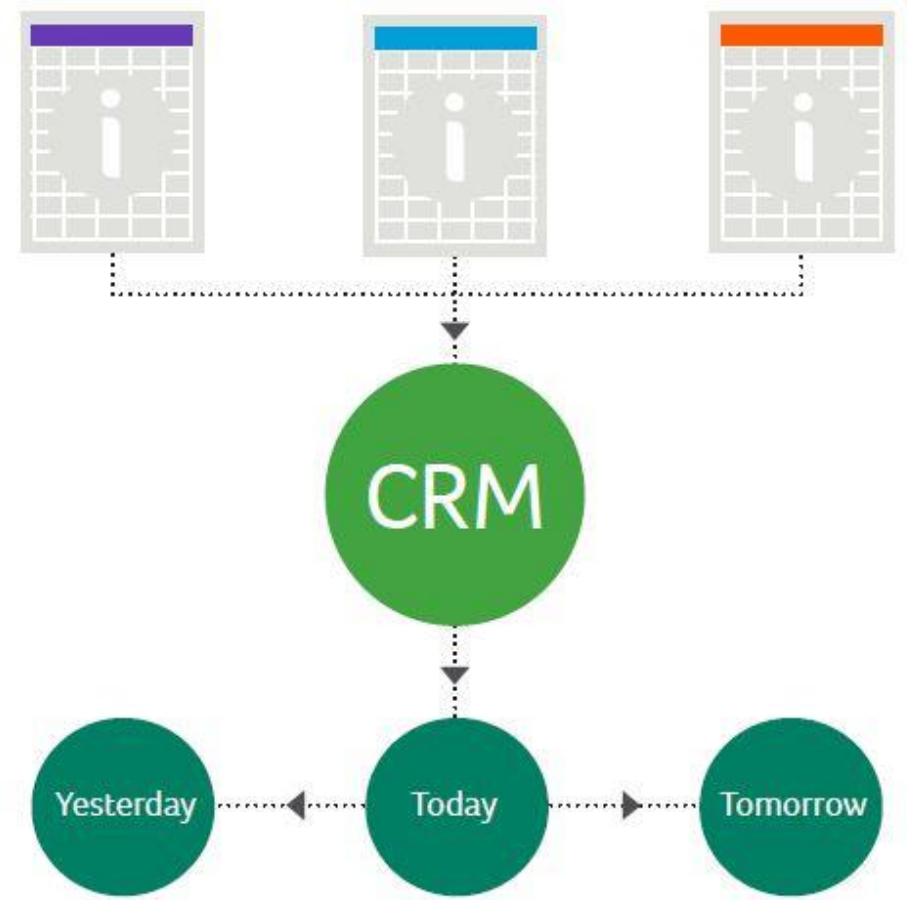
Sage CRM enables us to know what we are doing in terms of where we are, what's out there, and what we should be going after. It has certainly contributed to our growth.”

*Karen Zfaty,
Director, Marketing Info Systems*

Extend and adapt Sage CRM
to suit the needs of your business

Adapts to your business

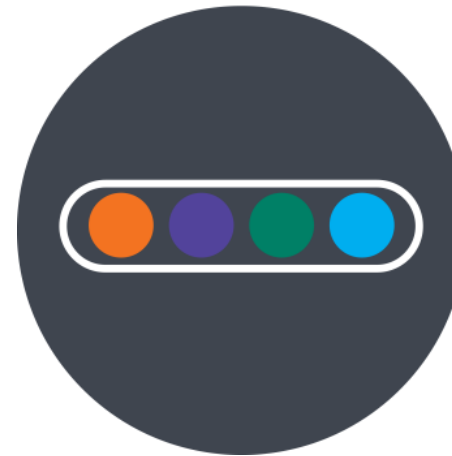
- We understand your business is growing and our intuitive CRM tool is designed to adapt to your needs now and in the future.
- Streamline business processes to match how your business works - highly customisable workflows make business processes simpler and easier to follow.
- Capture information specific to your business – Sage CRM fields and screens can easily be adapted to your needs.
- Create new business modules to manage key areas of your business with ease.



Automate your key business processes with Sage CRM



- Sales, marketing and customer service workflows are available out-of-the-box so you can streamline processes in these key business areas.
- This eliminates the need to perform manual tasks around daily activities, improving the productivity of your teams.
- These workflows are fully customisable enabling you to write your own rules based on your unique business needs.
- Alternative workflows are also available to suit shorter sales processes, simplifying the sales follow-up process.
- Standardising working methods in these areas ensures nothing is missed, so valuable information doesn't slip through the cracks.





“Being able to apply process improvement to document and email templates linked to workflows, where appropriate, will reduce duplication and inefficiency and increased file capacity for professional staff and mean significant changes in the way people work.”

*Sally Longmate,
Practice & Business Development Manager*



“One of the real advantages of the Sage system is that we’ll be able to keep latching on additional functionality and scale as our business requirements change. This flexibility is important to us.”

*Jon Evans,
Managing Director*

Empower your teams to be more
productive and efficient

Accelerate your business success



Award-winning
CRM for
business owners
and managers,
looking to drive
efficiency across
the business.



Drive productivity across your sales team and direct all your sales efforts towards your most profitable and winnable deals



Create highly targeted marketing campaigns, eliminate guesswork and optimize your marketing resources.



Delight your customers at every touch point and outperform the competition.



Manage every area of your business and generate a quicker return in your investment in Sage CRM

Accelerate your sales performance



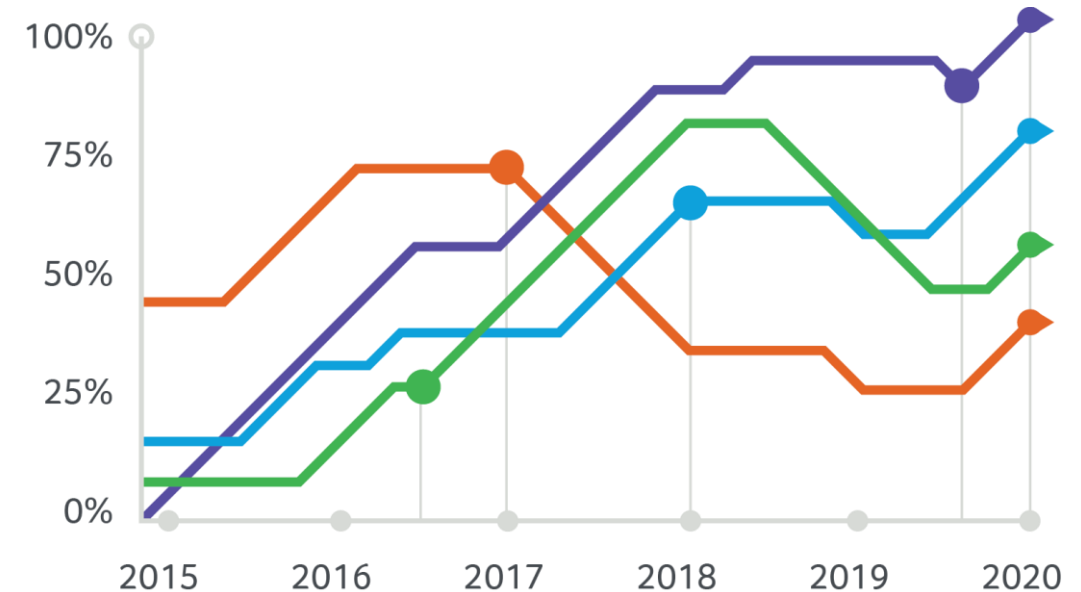
- Sales Force Automation
- Opportunity and Pipeline Management
- Forecasting and Reporting
- Sales manager Dashboards
- Quotes and Orders
- Territory Management
- Sales Workflow
- Lead Management
- Calendar Management
- Fully featured mobile CRM
- Dedicated sales apps
- Business Collaboration powered by Yammer



What does this mean for your business?



- Simplify the sales process and make the most of every sales opportunity. from initial lead through to close.
- Gain visibility and insight on your sales performance using highly visual sales dashboards.
- Act on detailed reporting and graphical representations for immediate analysis and quick decision-making.
- Automate proposal and quotation processes.
- Ensure sales team has access to all the information they need from Sage CRM online, anywhere they go, at any time.





“Sage CRM gives us the ability to track sales activity across the team. We can follow any new sales leads or opportunities, and manage the sales process. That’s the most important thing for us.”

*Nick Ryan, Director,
General Manager of Marketing and Sponsorship*

Targeted measurable marketing

- Campaign management
- Campaign reporting and analysis
- Marketing Dashboard
- List segmentation
- Rapid lead to opportunity management
- Campaign cloning
- Integrated telesales follow-up
- Reporting and analysis
- Email marketing
- Social CRM



What does this mean for your business?

- Deliver targeted marketing campaigns, eliminate guesswork and make the best use of your marketing resources.
- Manage your marketing campaigns across multiple channels and maximise your marketing budget.
- Integrate social media activity into your marketing mix, engage your customers and prospects and promote your products and services online.
- Manage and track your leads and ensure that sales opportunities are never missed and always acted upon.
- Share best practice with colleagues and execute consistent campaigns.



Execute more effective marketing initiatives



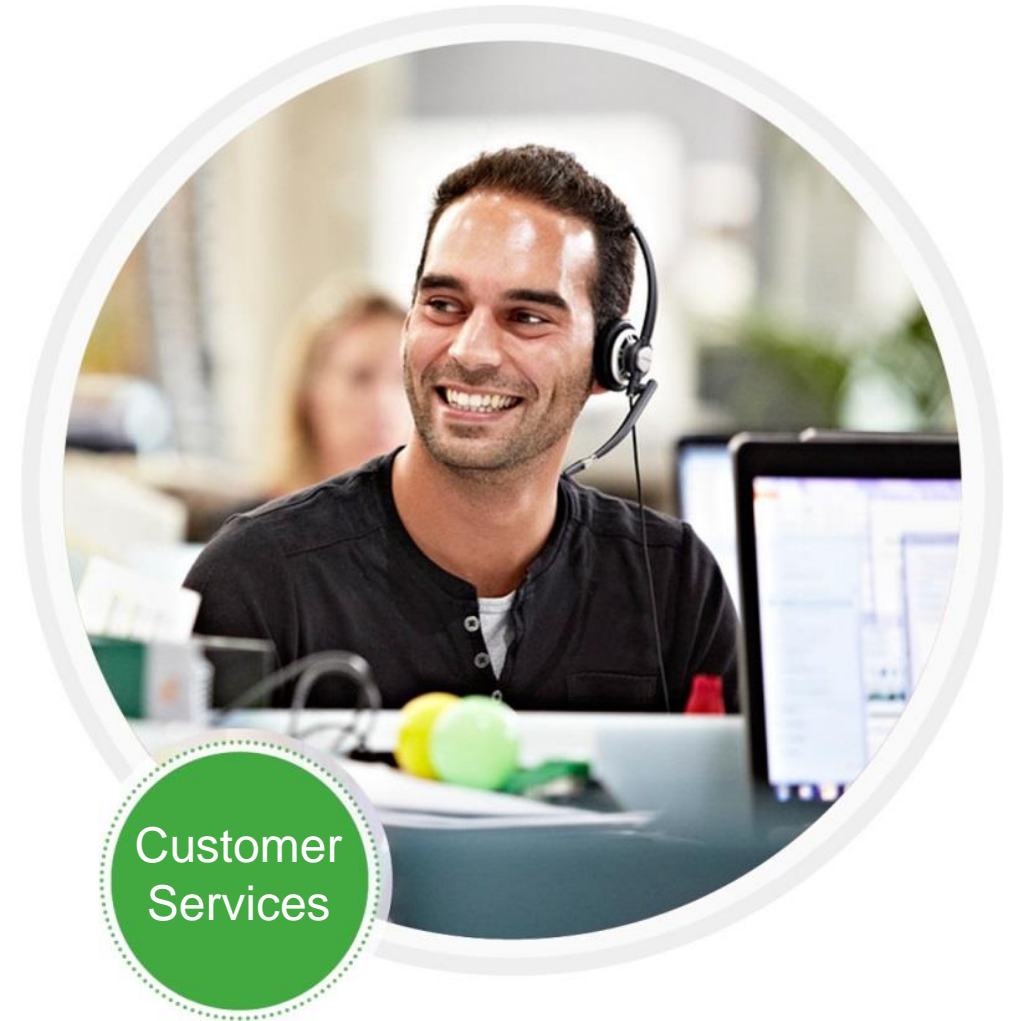
“Our marketing team is now beginning to see the benefits of running all campaigns from one system. We are executing more effective marketing initiatives across all our sales channels, as well as building campaigns to our existing client base.”

*Andrew Burne,
Sales Director*

Deliver exceptional customer service



- Case Management
- Escalation and notification alerts
- Knowledge base Management
- Workflow approval process
- Customer Service Dashboard
- Detailed analysis on call volumes and case resolution
- Traffic light monitoring
- Staff performance monitoring
- Reporting



What does this mean for your business?

- Manage and resolve customer queries and issues efficiently and effectively.
- Increase the productivity of your customer service representatives.
- Monitor the performance of your teams performance and ensure members are equipped to resolve customer issues and deliver an efficient level of service.
- Build an online knowledgebase of common issues and known solutions so your customer service teams can respond quickly to customer queries.
- Review customer service performance with powerful reporting capabilities.





“We believe that we’re now one of the leaders in the industry in providing critical information to clients, instantly accessible whenever they want it. This helps us to win new business and enhance our service to existing clients.”

*Simon Adcock,
Managing Director,*

Powerful tools to support your teams and
drive productivity

Unlock new possibilities with social CRM

- Sage CRM integrates with key social media applications such as Facebook, Twitter and LinkedIn.
- Now you can engage with prospects and customers collaboratively and generate leads, foster loyalty and increase revenues.





Sage CRM for LinkedIn

- Research prospects and connect with customers from within Sage CRM.



Sage CRM for Twitter

- View and manage Twitter feeds directly from within Sage CRM
- Update your company Twitter feed and track your brand or company mentions, all from within Sage CRM.



Sage CRM for Facebook

- Gain instant information about customers and prospects by associating Facebook profiles with prospect accounts for more detailed information

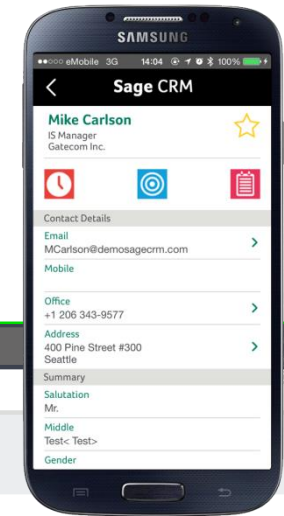


Go Mobile - Take Sage CRM with you



Sage CRM offers a range of solutions for you and your mobile workforce. You can access all the information you need from Sage CRM on your mobile device regardless of your location.

- Perform key sales activities quickly and easily with Sage CRM's native mobile apps.
- Access key customer information, schedule and manage activities, view history, and record email, calls, and notes.
- Work effectively on the go and quickly search and update contacts, opportunities, leads and cases.
- Choose from fully-featured mobile CRM or our dedicated sales apps.



Statistics for All Stages

Number of Opportunities:	Forecast:	Weighted Forecast:
7	USD 680,746.25	USD 234,100.22
Average Value:	Average Certainty:	Weighted Average:
USD 97,249.46	53.57%	USD 52,097.93

7 Opportunities, Page 1 of 1

Status	Description	Company Name	Person	Opened	Stage	Priority	Territory
Qualified (2)	50 Users plus consulting	Design Right Inc.	Arthur Browne	12/09/2016 8:24 AM	Negotiating	Normal	US East
Proposal Submitted (3)	100 User licenses	Eurolandia	Kieran O'Toole	11/28/2016 5:01 AM	Qualified	Normal	US East
Negotiating (1)	Training course	Gatecom Inc.	Simon Yaltoy	01/16/2017 12:52 PM	Proposal Submitted	High	US West
Sale Agreed (1)	20 User Deal	Hariob Controls Limited	Tony Smith	12/11/2016 7:31 AM	Qualified	Normal	US East
	200 User Global Deal	Maverick Papers	Annette O'Toole	11/28/2016 8:33 AM	Proposal Submitted	Normal	US Central
	10 User Pilot	Maverick Papers	Annette O'Toole	12/07/2016 8:41 AM	Sale Agreed	Normal	US Central
	Phase 2: 30 User rollout	Maverick Papers	Annette O'Toole	12/07/2016 8:47 AM	Proposal Submitted	Normal	US Central

Business Collaboration

Drive employee productivity and knowledge exchange with social-style collaboration powered by Yammer.

- Increase employee engagement
- Facilitate peer-to-peer learning
- Drive productivity through collaboration
- Collaborate across teams

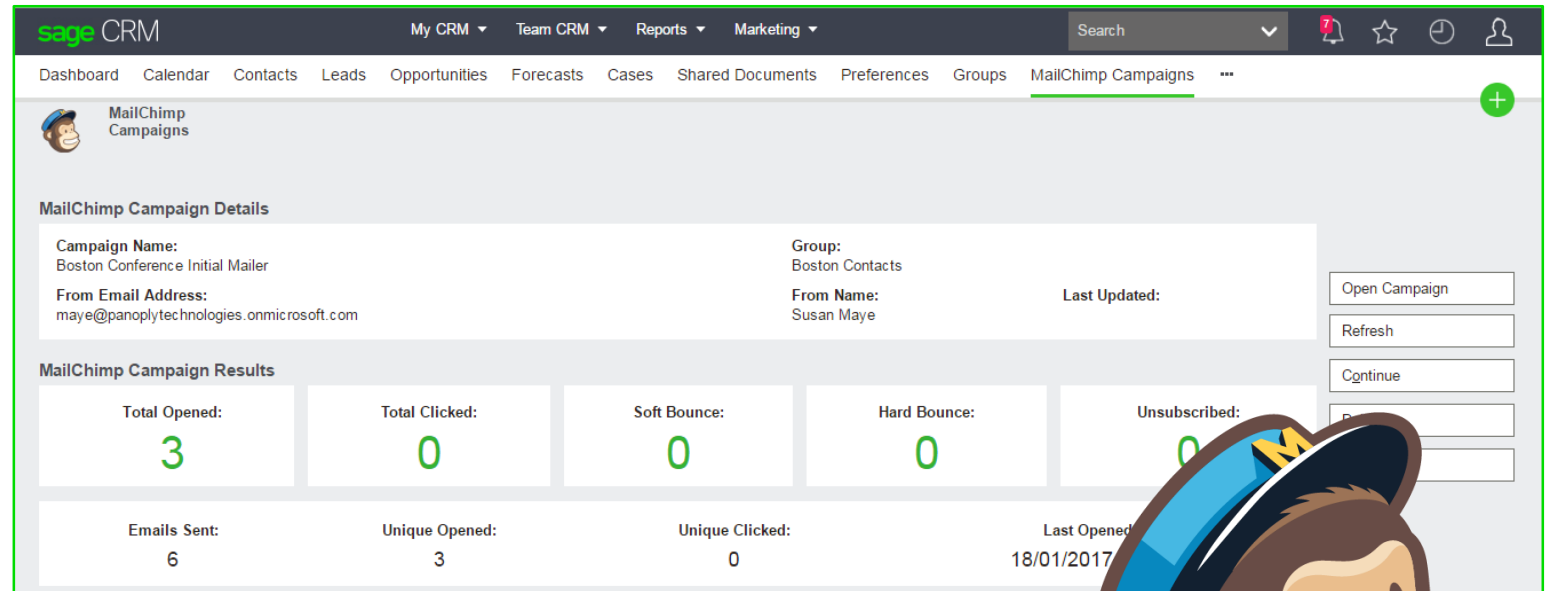


Email marketing made easy



Email marketing is one of the most effective marketing tools for small and medium sized companies. With minimal resources you can send personal, relevant emails to your customers.

- Sage CRM offers customers 2 email marketing integrations to suit their needs.
- These user-friendly email marketing tools enable you to create, send and track email campaigns and reach your contacts with the right message at the right time.
- And you can monitor open rates and responses to your campaigns in real-time and use this information to improve future campaigns.





“Sage has dramatically increased the amount of business we have, and I expect to see a 50-75% growth on turnover as a result of our marketing and sales efforts within the next 12 months.”

*Mike Burkinshaw,
Managing Director*



sage

Accelerate your business with

sage CRM

