

# Targeted measurable marketing



## Plan, execute, and measure your campaigns

An invaluable tool for marketers, Sage CRM enables your marketing teams to plan, execute, and measure the success of every marketing campaign. It becomes much 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 and accurate profiles of your customers and prospects for more highly targeted campaign planning.


The more highly 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 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 and assess opportunities and help focus on prospects that are more likely to purchase, increasing ROI and maximizing the marketing budget and spend. Highly graphical reports and charts can be displayed on the interactive dashboard for quick reference, enabling your teams to analyze data in real time.

## Benefits snapshot

- Create, track, and manage dynamic marketing campaigns that really deliver.
- Plan and track activities, tasks, budgets, and details for each marketing activity.
- Produce highly targeted customer communications, improving response rates.
- Enable real-time marketing performance analysis and pinpoint budget management.
- Fully customize marketing workflow out of the box for rapid campaign execution.
- Create and send targeted email marketing communications quickly and easily with Sage E-marketing for Sage CRM.\*
- Gather valuable information about your contacts' interaction with your email messages including open rates, clicks, and unsubscribes to determine campaign effectiveness.
- Leverage the power of social media to engage more effectively with your customers across Facebook, Twitter, and LinkedIn.

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

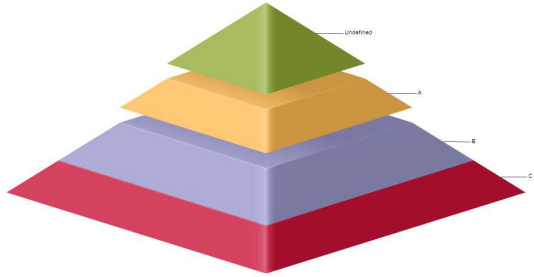


“We can track a specific sale back to the trade show that generated the lead. We can uncover how many leads that trade show generated, how many resulted in a sale, and the dollar value associated with the sales. This information helps us make the best use of our marketing dollars.”

**Allen Shulman**  
Chief Financial Officer  
Posera,  
Montreal

## Total campaign management

The total campaign management functionality in Sage CRM enables your marketing teams to easily structure campaigns for consistent execution and execute multichannel marketing campaigns for maximum reach and impact. With Sage CRM, every phase of every marketing campaign you create can be tracked to provide meaningful analysis and campaign measurement.



Source	Email	Setting	Sponned	Priority	Rated Date	Segment
			15/04/2012 18:16	Normal		Finance/Banking/Insurance
			15/04/2012 00:15	Normal		Manufacturer
			23/04/2012 17:35	Normal		Computers - Software
			24/09/2012 11:07	Normal		Professional Services

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 enables your 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.

With Sage CRM your teams can easily roll out automated marketing campaigns, putting marketing resources to their best use. The success of these campaigns can be tracked in real time, at any stage from the initial lead to the close. Another great feature lets teams clone campaigns, which easily drives marketingwide collaboration by enabling marketing users to share best practice within teams and re-create campaigns quickly and easily. With intuitive features and highly graphical reports, Sage CRM gives your marketing team the ability to match sales revenues to specific campaigns and to analyze marketing campaigns per lead source.

Powerful and flexible profiling of customers and prospects as well as direct integration to mass email and CTI functionality makes Sage CRM an invaluable tool for your company. Sage CRM not only tracks response rates, it also permits the matching of sales revenues to specific campaigns.

## Lead management

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 maximized 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 analyze and track the source of leads. Customized reports can also be designed and displayed on the interactive dashboard for quick reference.

## List management and segmentation

List segmentation using Sage CRM ensures you send highly targeted marketing communications to the right people every time. Customer data and prospect lists can be easily segmented based on desired criteria such as interest or demographics. Sage CRM ensures your team remain focused on prospects who are most likely to purchase, thereby increasing return on investment and maximizing marketing budget and spend.

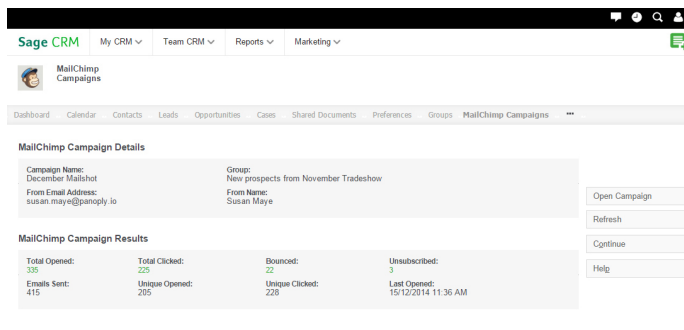
Sage CRM can be configured so that campaign responses trigger sublists for the next wave of the campaign, with successful responses moved to sales and nonresponses kept on a reminder list.

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.

## Sage E-marketing for Sage CRM\*

Email marketing is one of the most effective marketing tools modern businesses have at their disposal. With minimal resources, small and medium-sized companies can send personal, relevant, and timely emails to their customers and prospects while keeping costs to a minimum.

Email marketing is built into Sage CRM, and it allows you to quickly and easily build campaign lists, design effective email communications, and deliver your messages to the right people at the right time. Responses to your email campaigns can be analyzed in real time, allowing you to continuously make improvements and enjoy a greater return on investment.

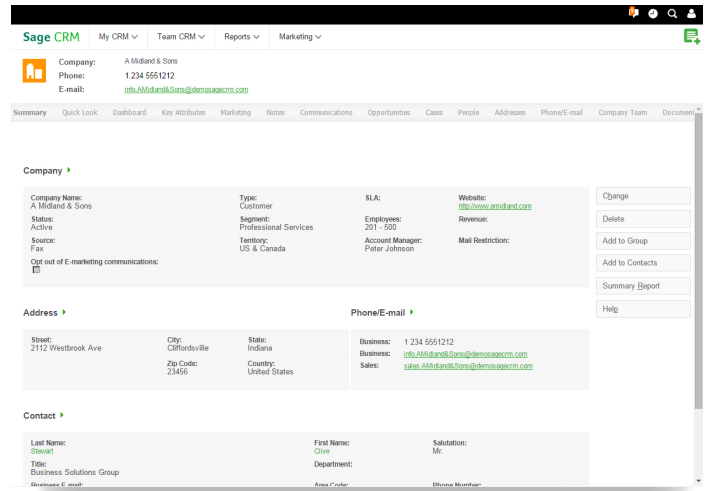


Manage your MailChimp email campaign from within Sage CRM.

## Targeted measurable marketing

Sage CRM integrates with MailChimp and Swiftpage, offering you more choices for your email marketing needs. Now you can eliminate guesswork, create highly targeted marketing campaigns, and get more from your marketing resources.

Open, click, and bounce rates are automatically tracked, enabling users to calculate accurate ROI and deliver hot leads to the sales team.



Get instant information about customers and prospects with Sage CRM for Facebook.

What can Sage email marketing do for your business?

- Create personalized, effective, and targeted emails covering all of your communication needs.
- Create lists of target groups within Sage CRM and use these to send targeted campaigns to customers and prospects.
- Send a series of emails to contacts automatically with marketing automation and reach the right people at the right time.
- Analyze email responses in real time and tweak campaigns as needed to ensure you get the maximum return on your investment from every campaign.

## Sage ERP integration

Connecting Sage CRM with your Sage ERP system gives marketing teams the information they need to mount more effective campaigns that maximize their budgets. Using Sage CRM and Sage ERP together, they can execute highly targeted promotions at new and existing customers, whether it's pushing overstocked items or a new product that matches a customer's buying history. They can also use the data to develop loyalty programs for the most profitable customers.

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.

## Reporting and analysis

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 program can be calculated accurately. Alerts can be created to notify users when they are over budget for accurate budget management.

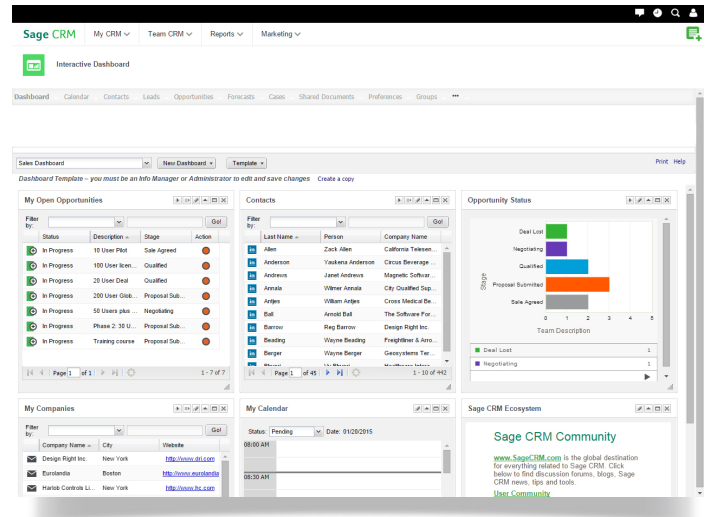
## CTI integration

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.

Powerful and flexible profiling of customers and prospects as well as direct integration to mass email and CTI functionality makes Sage CRM an invaluable tool for your company. Sage CRM not only tracks response rates, it also permits the matching of sales revenues to specific campaigns.

## The interactive dashboard

The interactive dashboard is an intuitive workspace that allows your marketing teams to view and monitor marketing campaigns and activities. A preinstalled marketing dashboard is available out of the box, or users can customize their own dashboard with content that is relevant to them and their role.



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

With the interactive dashboard, the marketing team can link to highly graphical reports and charts to track the success of marketing campaigns and activities. The dashboard can also be used to display important online information from websites and social media channels so your team can keep up to date with published news on your company and competitors.

“Sage CRM helps us tailor campaigns that are a lot less wasteful than advertising. We can make sure relevant customers are alerted when one of our roadshows visits their area, for example, or we can send them information about a new product that suits their profile. Sage CRM has definitely helped us differentiate in a market that’s price driven.”

**Steen Teisen**

CEO,  
Widex,  
China



Sage  
6561 Irvine Center Drive  
Irvine, CA 92618-2301

866-996-7243

[Sage.com](http://Sage.com)

### **About Sage CRM**

Over 15,000 small and medium-sized companies across the globe use Sage CRM every day to accelerate sales, drive business productivity, and make every customer interaction count. It is used by enterprising, growing companies seeking new ways to interact with customers, leverage the power of social media and take advantage of the latest mobile developments to further grow their business. When combined with Sage ERP, our customers enjoy better business insight, increased efficiencies, and productivity, and gain a single, customercentric view across their entire business. So whether you're just starting out or have already grown to several hundred employees, Sage CRM can help accelerate your business success.

Accelerate your business success with a free 30-day trial.

