



This document was designed to help identify the business areas where you can achieve the highest return on your investment (ROI) in Sage CRM and demonstrates how the features of CRM can add value to the customer-facing areas of your business.

Customer Care ROI

Central Repository of Information	
Enterprise-Wide Access	<ul style="list-style-type: none"> ▪ Increase accuracy and consistency of information by having all employees access the same data
Consistent Information	<ul style="list-style-type: none"> ▪ Create customer loyalty by providing reliable service
Accurate Information	<ul style="list-style-type: none"> ▪ Provide the correct answer the first time, thereby reducing redundant phone calls and e-mails
Shared Resources	<ul style="list-style-type: none"> ▪ Create internal confidence and positive attitude in the workplace ▪ Resources are available and within reach
Document Library	
Knowledge Management	<ul style="list-style-type: none"> ▪ Give employees/customers access to the same information, including white papers, quotes, manuals, collateral, etc.
Easy-to-Use Features	
Search Engines, Hyperlinks, Scheduling, Team Collaboration, Quick Access to Multiple Addresses and Contacts	<ul style="list-style-type: none"> ▪ Reduce employees' interaction time with customers ▪ Allow more time for improving customer satisfaction, building loyalty and good internal morale ▪ Speed up responses to customer issues ▪ Ensure customer issues are handled by the right people
QuickLook Tab	<ul style="list-style-type: none"> ▪ View communications, cases and opportunities with contact and company information ▪ Enable employees to act on issues and resolve problems themselves
Call Center Efficiency	
Improved Customer Service	<ul style="list-style-type: none"> ▪ CRM provides all the resources necessary to handle customer issues quickly and correctly the first time <p>CRM helps increase:</p> <ul style="list-style-type: none"> ▪ Percentage of calls resolved the first time ▪ Phone calls per employee ▪ Automated Call Distribution (ACD) calls answered ▪ Customer loyalty ▪ Staff attendance <p>CRM helps reduce:</p> <ul style="list-style-type: none"> ▪ Total ACD calls ▪ Redundant calls ▪ Interaction times ▪ Escalations ▪ Hold times ▪ Abandon rates ▪ Average time-to-answer ▪ Orders entered incorrectly
Other Improvements	
Increased Efficiency	<ul style="list-style-type: none"> ▪ CRM frees up more time to invest in proactive "outbound" calling, assure follow-through of customer care issues and learn through staff

	interaction
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Marketing ROI

Structured Campaign Management	
Real-Time Analysis Tools	<ul style="list-style-type: none"> ▪ Identify outstanding issues quickly with real-time reporting features ▪ Cancel or accelerate campaigns according to their performance ▪ Save lists and campaigns for future use ▪ Automate cancellation of poor-performing campaigns
Campaign Detail Retention	<ul style="list-style-type: none"> ▪ Mirror successful campaigns without redundant data entry
Easy-To-Use Features	<ul style="list-style-type: none"> ▪ Allow anyone to design and evaluate campaigns effectively ▪ No additional staff or training required
Lead Generation and Distribution	
Automated Processes	<ul style="list-style-type: none"> ▪ Reduce human errors ▪ Make sure the right people get the information they need immediately
Tracking and Status/Stage Reports	<ul style="list-style-type: none"> ▪ Evaluate lead status ▪ Ensure company invests in opportunities most likely to close
Rapid Response by Organization	<ul style="list-style-type: none"> ▪ Create customer loyalty by addressing customer needs instantly
Consistency Throughout Organization	
Enterprise-Wide Access	<ul style="list-style-type: none"> ▪ Everyone has access to the documents in the central library
Date and Time Stamp	<ul style="list-style-type: none"> ▪ Track communications in customer files by campaign
Authorized Access	<ul style="list-style-type: none"> ▪ Allow approved customers access to documents
Reducing Collateral Time to Approval, Print and Web Posting	
Central Repository for Collateral	<ul style="list-style-type: none"> ▪ Prevent collateral loss ▪ Avoid using e-mail to transfer documents for approval ▪ Prevent document transfer delays and lost e-mails
Authorized Access	<ul style="list-style-type: none"> ▪ Allow approved outsource companies access to documents and use of the central library
Alerts and Reminders	<ul style="list-style-type: none"> ▪ Alert users when approval is required ▪ Remind users about project due dates
Web Self-Service	<ul style="list-style-type: none"> ▪ Enable internal and external users to finish projects in a timely fashion ▪ Avoid additional costs for last-minute print runs ▪ Guarantee consistency and accuracy by working off the original document ▪ Reduce time to approve collateral and other documents

Sales Force Automation ROI

Lead Distribution	
Automated Distribution	<ul style="list-style-type: none"> ▪ Fast response times regardless of the channel that initially acquired the lead
Alerts and Reminders	<ul style="list-style-type: none"> ▪ Ensure leads do not fall through the cracks
Real-time Analysis Tools	<ul style="list-style-type: none"> ▪ Produce up-to-date sales status and stage information
Information Acquisition at Lead Status	<ul style="list-style-type: none"> ▪ Acquire detailed customer, product and competitive information ▪ Make sure the right people handle the right leads
Organized Sales Cycle	
Escalation Management	<ul style="list-style-type: none"> ▪ Ensure sales prospects are dealing with the appropriate person at each stage of the sales cycle
Opportunity Tracking	<ul style="list-style-type: none"> ▪ Enable employees to address new issues as they arise ▪ Access to details at every stage ▪ Reduce requests for redundant customer information
Client Ownership	<ul style="list-style-type: none"> ▪ Follow leads all the way from prospect to after-sales care ▪ Ensure clients always feel their needs are looked after, every step of the way
Real-time Graphical Analysis and Reporting	<ul style="list-style-type: none"> ▪ Access real-time data for strategic analysis and decision-making ▪ Create customized reports based on user-selected data for better, more relevant evaluations
Reduced Administration and Redundancy	<ul style="list-style-type: none"> ▪ Shorten sales cycles ▪ Allow more time to focus on the deals most likely to close
Internal Evaluation and Training Needs Assessment	
Sales Cycle Analysis Tools	<ul style="list-style-type: none"> ▪ Analyze leads generated by territory ▪ Evaluate the percentage of deals closing at each stage of the sales cycle ▪ Identify employee strengths and weaknesses ▪ Evaluate sales follow-through effectiveness