

sage

ACCOUNTING & CRM:

***Together, your  
business is stronger***



## What you'll learn in this eBook

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Sage customers around the world have been telling us about the many benefits their businesses experience when they connect their CRM with their accounting solution.

This eBook showcases five success stories that show how our customers discovered the key benefits of connecting their accounting system to Sage CRM, for example:

- improved customer service
- greater productivity
- increased efficiency, and
- business growth.

Throughout this eBook you will see how other businesses like yours have grown by having one consolidated view of their data.

Discover how customer facing functions such as sales, marketing and customer service benefit from having access to back-office business activities including manufacturing, purchasing, accounting, and distribution.

A business wide approach to the CRM of your front-office being connected with your accounting system can:

- bridge information gaps between departments
- enable your teams to provide superior customer service
- empower your business to sell more efficiently and market more effectively, and
- drive productivity by automating your day-to-day business processes so you spend less time on administrative tasks.

Simply put, your business functions are **much more knowledgeable** and **make better business decisions** which **add value to your business**.

# The challenge of disconnected systems

**Did you know that disconnected business systems slow down your teams efficiency.**

Regardless of the size of a company, silos of information are obstacles to becoming more efficient, and these barriers can reduce the productivity of employees. These silos and barriers can cause:



## INACCURATE INFORMATION

Businesses experience more mistakes if there are multiple sets of information with different people entering data at different times.



## UNNECESSARY PAPERWORK

The gathering of paperwork can slow down your day-to-day business processes and impact your teams' efficiency.



## DISCONNECTED DATA

The productivity of your business could be hampered if different departments are only able to access data from their part of the business.



## INEFFICIENT BUSINESS PROCESSES

Without accurate and up-to-date information, inefficiencies creep into your business and opportunities are missed.

**It's time to move away from disconnected systems and to outperform the competition with the power of a connected CRM solution.**

## 5 business challenges that Sage customers have overcome

Every company depends on a diverse mix of employees with various skills. Your employees can use accurate, up-to-date and relevant information when they interact with customers, and this information represents a high-value asset regardless of a person's role. Similarly, employees don't have to waste time exporting data from disparate systems to give others the critical information they need.

A connected CRM solution impacts on people at all levels in your business. In the next section we explain how five Sage customers have benefited from a connected solution in five core business areas.

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# 1. Management gets a platform for growth

**Rockend is a Sydney-based software provider specialising in property management applications. In the past, Rockend Software relied on multiple systems for customer support, sales and marketing.**

Now the company's sales teams can see the most profitable and winnable opportunities on a sales pipeline and **close them a lot faster** than ever before.

The management team at Rockend is making **more informed decisions** based on the latest front-end and back-end information.

A central view of customer activity gives you the critical information you need to run a successful company. You can make decisions based on having visibility over staff productivity, sales forecasts, sales performance and a complete view of where deals are in the pipeline.

As a manager, if you have this information on a single dashboard, you can ensure the right balance between business development, profitability, and cash flow.

Drilling down into departmental data – from quotes and billing to after-sales service – provides you the basis for reports that offer a comprehensive view of business performance; and it should also expose risks and opportunities. This means you can make more informed decisions and steer your business in the right direction.

**John Goddard**  
CEO at Rockend  
Sage CRM and Sage 300

*"We've invested a lot of time and money into the new system because we needed a system that would support our plans to grow and expand. Sage is the key platform for our growth for the next 10 years."*

## 2. The payoff for Sales

**Sales Director, Ralph Coleman from Blue Sky International used to struggle to keep track of his sales team. Sunday evenings were spent creating manual reports based off inaccurate data.**

Since the successful launch of their Sage connected CRM solution, Ralph has a much better insight into his sales teams' activities which allows him to report more effectively to management.

A connected solution gives you and your sales people access to information you need, when you need it. Your sales team can find pricing and financial information regardless of your finance teams' availability.

A connected solution facilitates up-to-date product catalogues and cross-sell opportunities, shortening the time it takes to turn your prospects into customers

When checking financial details inside the CRM (e.g. historical sales orders, cases or invoices), your sales team have all the information they need to close deals.

Last but not least, you are in a position to manage customer expectations about delivery times because you have access to stock level information.



*"It gives me a real quick heads-up display of how my sales team are performing, it lets me know what's in the pipeline, what opportunities are there, what sales are likely to come in at any given time and gives me a really great overview on a monthly basis."*

**Ralph Coleman**  
Sales Director at Blue Sky  
International  
Sage CRM and Sage 200

## 3. Marketing gets rewarded

***Gressco, a children's furniture manufacturer knew their dated systems for handling marketing communications and customer support were no longer suitable as the company grew. They needed to link up back and front office processes and knew a connected CRM solution was the answer.***

Thanks to the marketing features in Sage, Gressco is able to tailor its campaigns to a specific audience, saving time, money and improving overall campaign results.

With access to key customer information, your marketing team can execute highly-targeted promotions at new and existing customers, for example promoting overstocked items or a new product that matches a customer's buying history.

With an connected accounting and CRM solution, companies can devise more targeted campaigns based on real customer information, thus delivering a better return on their marketing budget.

For example, your marketing team can create more focused and relevant mailing lists by segmenting customers based on the frequency and value of their orders. They can then develop campaigns that maximise opportunities with high-value customers. And they can market surplus stock (as identified by your accounting solution) at customers who previously bought similar products.

**Christopher Krumm**  
VP of Finance at Gressco  
Sage CRM and Sage 300

*"Sage is an ideal tool to help us accomplish this type of highly targeted marketing communication. Like every marketers dream, we can give our customers more of what they want, and less of what they don't want."*

## 4. Customer satisfaction sky rockets

**Source Technologies is a leading US provider of magnetic ink recognition solutions.**

Once they decided to expand their product offerings, they knew they needed to increase the efficiency of their sales and customer service teams.

A centralised, intuitive and scalable CRM and accounting solution was identified as the way forward.

A joined-up solution empowers customer service teams to handle queries and complaints more effectively.

By matching a complaint to an order or an invoice, your customer service teams can initiate more informed responses and resolve problems quicker.

Customer service teams can also identify valuable customers, and, if needed, refer to sales to nurture these relationships. This reduces the risk of long-term damage to relationships your company has with customers.

*"Sage has fulfilled our initial needs for the centralised creation of an all-inclusive customer database, and continues to meet our requirements by providing our entire enterprise access to the data needed to close sales, satisfy customers, and build long-lasting relationships"*

**Tim Baker**

Director of Information Systems  
at Source Technologies  
Sage CRM and Sage 300

## 5. Finance gets greater efficiency

**The Australian Grand Prix Corporation facilitates the holding of Formula One and Motorcycle Grand Prix events, handling everything from ticket sales to the actual race day.**

General Manager Jeremy Kann wanted an integrated CRM and accounting solution to replace manual processes. He explained his rationale: "The margin for error was too great and we just felt we wanted to streamline our entire operations, linking sales to finance"

Just like Jeremy, with end-to-end visibility, your company's finance department can drive better business performance across sales and marketing, billing, debt collection, and stock control.

Your CFO should be able to evaluate what's coming in and out of the business and adjust budgets and forecasts as a result.

A business management solution should remove the need for the manual processing of orders and invoices, thus freeing up a finance team to focus on alternative value-adding tasks.

Similarly, a connected CRM solution enables sales and accounts to work together on payment processing and credit control.

### **Jeremy Kann**

General Manager at the  
Australian Grand Prix  
Corporation  
Sage CRM and Sage 300

*"Whole processes have been eliminated. You enter information once and finance spit it out as an invoice. Because it had been manual on both sides, reconciliation took much longer. Now it's fully automated and so much easier"*



# The power of a connected CRM

**Businesses all around the world are already experiencing the power of a connected CRM solution.**

**YOU CAN TOO.**

Drive revenue growth in your business and reap all the benefits of a connected CRM solution and transform your company into one that:

## **Pitches new products to the right people**

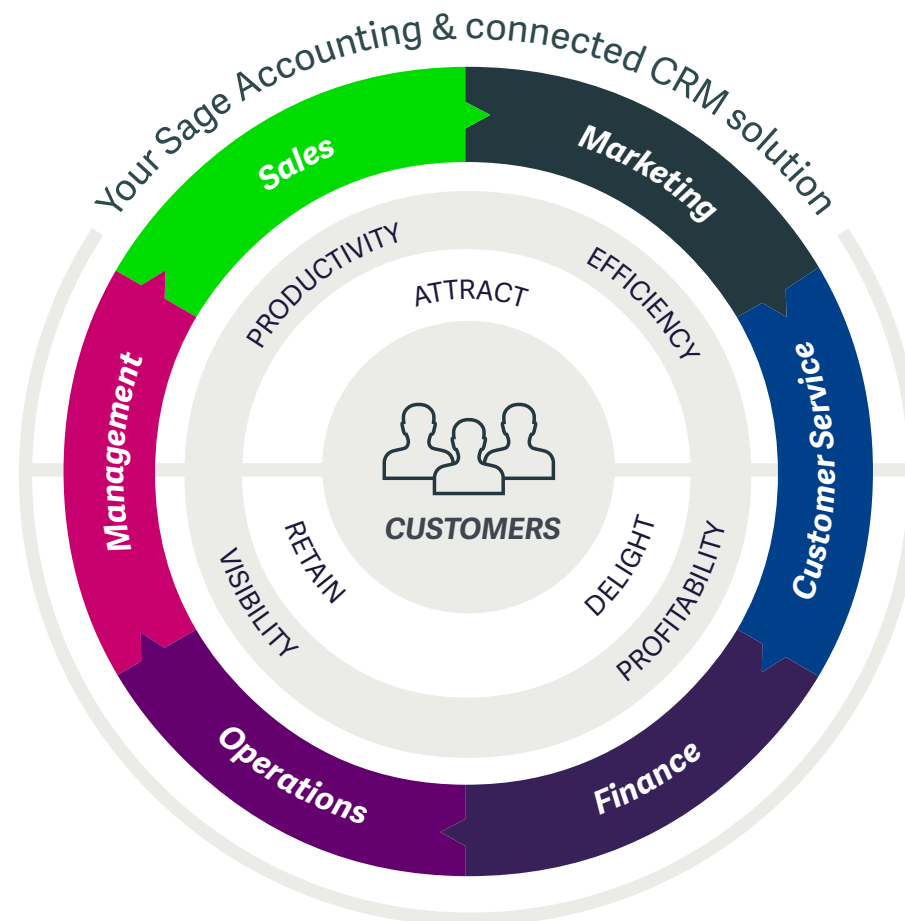
With better business insight, you will be able to leverage reliable customer data and target customers who want your new products and services.

## **Empowers more productive people teams**

An connected solution gives your colleagues what they need to become more productive, and it also helps you avoid duplication of work. Customer service teams handle customer queries more efficiently, and sales teams can source quotes faster and meet specific shipment and delivery requirements.

## **Work faster and smarter**

Automating work-flows that seamlessly connect one department to the next ensures your business processes run smoothly and efficiently.



## **Markets more effectively**

With an connected solution, you will be able to create targeted campaigns based on customer information and deliver a better return on your marketing budget.

## **Improves customer service**

With a complete view of the customer life-cycle, your customer service team gains the tools they need to resolve queries faster and with more personal responses.

## **Uses visibility to drive profitability**

Using real-time information about the volume and value of trade in your business, you can identify sales patterns and cross-sell opportunities.

## Put your business on the path to growth today!

**Bringing accounting and CRM together with the help of technology is key to helping you excel in a customer-driven environment. Did you know that as a Sage customer, you already have this solution?**

You can avoid the hassle and time of having to deal with multiple vendors and scale your existing solution as your business grows.

Get the business insight that matters to you. Put your solution to work today and discover how Sage can help grow your business.

This powerful connected solution with simple and intuitive features for your business is affordable, easy to use, highly adaptable, and delivers the insight you need to run and grow your business.

From Sales, Marketing and Services modules to fully integrated CRM, we help extend the power of your Sage accounting solution right across your business.

**Is your business ready to take the next step?**

Take a test drive today >>

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