



# Sage CRM | Exceptional Customer Service

## Deliver fast, efficient customer service and support

Winning a new customer is only the beginning of what should be a long and profitable relationship. But keeping customers happy means ensuring they get what they want, when they want it. From defining processes, to tracking cases and solutions, you can resolve customer issues effortlessly.

Sage CRM gives you the tools you need to provide high quality customer care and maintain satisfied customers, and helps you to make every customer interaction informative, effective, and profitable.

The intuitive Sage CRM interactive dashboard allows customer service users to easily view real-time customer information and resolve their issues effortlessly by employing the escalation features of Sage CRM.

Integration with leading Sage ERP systems gives customer service staff access to back- and front-office customer data for a complete 360 degree view of every customer; making every customer interaction more informative and effective. Integrated Sage ERP data can be displayed directly on the interactive dashboard for convenient access and analysis from a single workspace.

### BENEFITS SNAPSHOT

Manage your customer accounts with insight and collaboration

Respond to customer cases quickly reducing response times to customer service requests

Enable agents to quickly and accurately find the right answer the first time

Enables customer satisfaction measurement and benchmarking

Increases productivity of customer support representatives

Provides self-service facility to customers around common issues

Enables customer issues to be tracked and responded to, regardless of who answers the phone or receives the e-mail

Monitors service performance against service level agreements

Reduces customer support costs and cost of customer retention

Decreases the number of customer complaints received and increases customer retention

Enables benchmarking/score carding of customer service operations on an on-going basis

Delivers a single view of relevant and comprehensive information on the interactive dashboard

Empowers the customer service team to provide a consistent and excellent service to customers

- Customer queries can be monitored in real-time to ensure that SLAs are reached. A traffic lighting system automatically highlights cases that do not meet SLA response times.

The screenshot shows the Sage CRM interface for a 'Customer Service' team. At the top, there's a navigation bar with 'Recent', 'Calendar', 'Cases', and 'Solutions'. Below this is a traffic light chart showing the status of 19 cases: 10 Logged (orange), 2 Queued (blue), 3 Investigating (red), 2 Waiting (green), and 2 Solved (yellow). Below the chart is a table of cases.

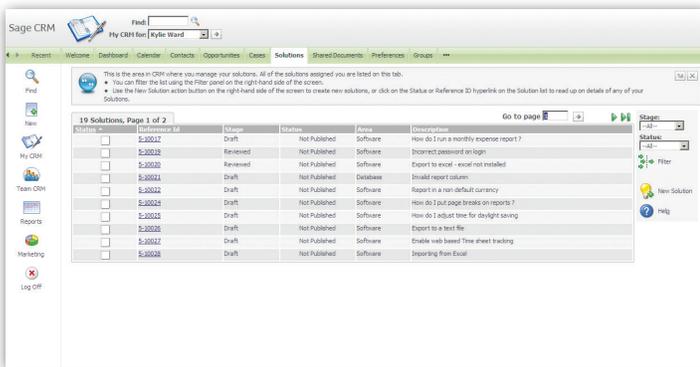
Status	RefId	Priority	Fix in	Person	Product Id	Description
Logged	5-2	Normal	3.0	Kieran O'Toole	3	User Interface
Logged	0-20	Normal		Arthur Browne	4	Setup not working
Logged	5-10027	Low	2.0	Annette O'Toole	7	Access Violation accessing tab
Logged	5-10029	High	2.0	Annette O'Toole	6	Issue with Bank Holiday recording
Logged	5-10030	High	2.0	Reg Barrow	7	Faulty report
Logged	5-10031	Normal	2.0	Garreth McDaid	1	Error on log out
Logged	5-10033	Normal	2.0	Garreth McDaid	3	Navigation problem
Logged	5-10034	Normal	2.0	Garreth McDaid	6	Tabs not tabbing correctly
Logged	1-10043	Low	2.0	Reg Barrow	6	Incorrect user license error
Logged	5-10045	Normal	2.0	Annette O'Toole	4	Month to Month comparison issue

## Case Management

Sage CRM provides the customer care team with the ability to record customer queries/incidents which need to be followed-up. If a case is not followed-up within the time allocated, it will automatically trigger an escalation procedure to inform the customer service manager. This ensures that customer cases are attended to in a timely manner and that issues do not get lost 'between the cracks'. Cases can be tracked and actioned directly from the interactive dashboard without the need to switch between screens, maximising the productivity of agents.

## Knowledge Base

Sage CRM provides central knowledge base capabilities for technical solutions to known issues or questions. This provides agents with easy and immediate access to a central bank of information and keeps accurate records of contacts with customers via case tracking and communication logs.



- ◆ Sage CRM equips customer service agents with predefined solutions that they can access when trying to resolve a customer service issue.

Customer service staff can find a solution to a customer query quickly and easily which ultimately results in improved customer care. A full workflow approval process ensures that only solutions which have been reviewed and approved by the relevant manager are published in the knowledge base.

## Workflow

The ability to define customer care processes and escalation points is controlled and managed by a feature in Sage CRM called workflow. If a customer service case or query remains unresolved for longer than the predefined time, the workflow process triggers an automatic escalation notification to the customer care manager.

This alert is a powerful automatic reminder that ensures each case is followed-up on. Workflow can be fully customised in order to ensure that cases are progressed in accordance with company-specific requirements.

“Everyone in the company can now see all the information they need about customers so that we can service them better.”

**John Goddard,**  
CEO,  
Rockend Software

## Reporting

Sage CRM provides powerful reporting capabilities which make it easy to monitor and measure customer service performance. Reports and dashboards provide overview information and detailed analysis on metrics such as call volume, case resolution times, communications and follow-up statistics. Customers can be provided with customised reports to demonstrate that the resolution criteria within their SLAs are being met. These can be displayed on the interactive dashboard for quick and easy access and analysis.

Report charts are highly visual and can be incorporated into presentations for a professional look and feel. The charts are all configurable, customisable and skinnable so users can modify the charts to suit their specific needs.

“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,  
ATEC Security Limited

The screenshot displays the Sage CRM interface for a customer record. The top navigation bar includes tabs for Recent, Summary, Quick Look, Dashboard, Key Attributes, Marketing, Notes, Communications, Opportunities, Cases, People, Addresses, Phone/E-mail, Documents, Self-Service, Relationships, and a menu icon. The left sidebar contains icons for Find, New, My CRM, Team CRM, Reports, Marketing, and Log Off. The main content area is divided into three sections: Company, Address, and Contact. The Company section shows details like Company Name, Status, Source, Type, Segment, Territory, SLA, Employees, Account Manager, Website, Revenue, and Mail Restriction. The Address section shows Street, City, County, Post Code, and Country. The Contact section shows Last Name, First Name, Salutation, Title, Department, Business E-mail, Area Code, and Phone Number. A right-hand sidebar contains action buttons: Change, Delete, Add this record to a Group, Add to Contacts, Summary Report, and Help.

- Sage CRM maximises customer satisfaction and drives customer loyalty by equipping agents with comprehensive, real-time information on the customer and their account.

## Team Management

Sage CRM provides management with a powerful tool to monitor agents' performance. Managers can assess quantitative metrics such as case volume and the case resolution times, as well as qualitative metrics such as the prioritisation of cases and overall customer satisfaction which can be displayed on the interactive dashboard for ease of reference. This means that staff are motivated and fully equipped to resolve customer issues and customers receive a more meaningful and personalised service.

## Web Self-service

Sage CRM offers a web self-service module that enables businesses to allow their customers, partners and suppliers to access a subset of their Sage CRM data and functionality over the web at their convenience. This capability can be fully integrated within the company's own website, ensuring that their customers benefit from an entirely seamless experience.

## ERP Integration

With Sage CRM and ERP integration, customer service staff have access to customer data from the back-office as well as the front-office for a true single view of the customer.

For example, customer service staff can easily check the availability of stock across different locations and can check the real-time status of orders without having to rely on multiple, disparate systems or consulting colleagues who may not be available. This enables staff to give accurate information to customers without delays, thereby improving customer service and driving customer loyalty.

Information from the integrated Sage ERP system can be displayed on the interactive dashboard for quick and easy access, equipping the customer service team with powerful information to provide customers with a consistent and exceptional service.

The interactive dashboard provides the customer service team with an intuitive and customisable workspace from which they can manage and control all customer queries. Agents can dynamically view and access multiple customer information from the dashboard providing them with a holistic view of the customer and enabling them to better serve their customer needs.

"Whenever we answer a call to a client, we have their information at our fingertips, so the client feels a lot more valued."

**Mike Bowers,**  
**Managing Director,**  
**Cellular Solutions**

The screenshot displays the Sage CRM interface for a user named Clive Stewart. The dashboard is titled 'Company Dashboard' and includes a navigation menu with options like Recent, Summary, Quick Look, Dashboard, Key Attributes, Marketing, Notes, Communications, Opportunities, Cases, People, Addresses, Phone/E-mail, Documents, Self Service, and Relationships. The main area contains several widgets:

- Company Contacts:** A table with columns for Person, Phone Full Number, and Business E-mail. It lists two contacts: Clive Stewart (44 1473 894 8181, CStewart@dem...) and Susan Blakeley (44 118 150 2667, SBlakeley@dem...).
- Open Cases by Agent:** A table with columns for Refid, Assigned, Severity, Description, and Action. It lists several cases assigned to Kyle Ward, with varying severities and descriptions.
- Opportunities by Sales Rep:** A table with columns for Assigned, Description, Certainty%, Forecast, and Action. It shows one opportunity assigned to Peter Joh... with a forecast of € 8,170.87 and € 5,155.00.
- Related Companies:** A table with columns for Relationship and Related Company. It lists relationships such as Owned By (A&W Services), Supplied By (American Foods), and Supplier to (Atlas & Baird).
- Pending Communications:** A table with columns for Date / Time, Action, Subject, Description, Priority, and Status. It lists two pending communications: an E-mail In about a Trade Show Mailer and another E-mail In about an Email Marketing Shot, both dated 07/02/2012.

- Boost productivity amongst your customer service team with the interactive dashboard – an intuitive and customisable workspace from where they can manage all customer queries.

## The Interactive Dashboard

Users can view communications, contacts, leads, opportunities or cases all through the interactive dashboard. This ensures that customer service staff are equipped with the most accurate and up-to-date information at their fingertips regardless of where it is located within Sage CRM, enabling them to provide a consistent and excellent customer service at all times.

The interactive dashboard can be customised to display relevant information from within Sage CRM, including feeds from websites and information from integrated Sage ERP systems. Users can choose to use the pre-installed customer service dashboard available out-of-the-box or customise their own dashboard or team dashboard to create a bespoke workspace to suit their needs. Gadgets can be positioned and sized accordingly to provide users with maximum flexibility on the layout of their dashboards.

Users can also create a company dashboard for specific key accounts to enable them to better serve their customers. With the interactive dashboard, the customer service team can monitor customer cases from the one workspace, boosting agent productivity and maximising the efficient use of their time.

### About Sage CRM

Sage CRM is used by over 12,000 organisations in 70 countries worldwide to manage their critical sales, marketing and customer service activities every day.

Sage CRM is optimised specifically for businesses with 20-2000 CRM users. Easy to use and quick to deploy in the cloud or on-premise, it delivers a rapid return on investment so you see a positive impact on your business straight away. Plus, it can be easily adapted by you to make it fit how you work, saving you time and money, both now and in the future. In this way, we help you get the most from your CRM investment and accelerate your business growth.

Visit our business partner CRM2care via [www.crm2care.nl](http://www.crm2care.nl) or just send an email to [info@crm2care.nl](mailto:info@crm2care.nl).

### The CRM2care Difference

- The leading supplier of Sage CRM in The Netherlands
- Over 5,000 Sage CRM seats activated
- Customers in great variety of segments
- Over 20 Sage-certified consultants available for implementation and support
- 20 years experience
- Successful local and International implementations