Sage CRM Training Guide for Sage Dev Team

Sage CRM is an ideal solution for companies that need to streamline processes between departments or provide customer-facing staff with financial information, including the ability to create orders through the Sage CRM interface that pass through to the Sage accounting system. Sage CRM's process automation features and integration with accounting are both very powerful and contribute to how successful Sage CRM has become.

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Section 1: What is Sage CRM?

CRM is an acronym for Customer Relationship Management. It is really a communications system that allows companies to track information beyond accounting data. For example, the software allows you to profile companies, people, deals, and customer service issues – as well as any/all communications or documents.   This is a big step up from Outlook and Excel. Sage CRM is also a common replacement for applications such as ACT!, GoldMine, Salesforce.com, or custom access applications. Sage CRM is often used to manage information for sales teams or customer service departments. It offers many marketing features as well. Sage CRM is geared towards companies that are looking for a powerful CRM, to manage data for 7 or more employees.

Section 2: Key facts you need to know!

1. Sage CRM is a communications system used by over 17,000 companies around the world.
2. Sage CRM is a non-industry specific, general purpose communications system.
3. On average, companies that use it have 12 users accessing the system.
4. It consistently ranks as a top 5 CRM solution.
5. It always gets the CRM industry's 'best overall value' award.
6. Sage CRM integrates with the full line up of Sage accounting systems including 50, 100, 300, 500, X3 and Intacct.
7. Globally, Sage CRM sales have increased by >26% each of the last 2 years. So – NCA was up 26% in 2020 and this year it is on track to do the same.
8. Beyond the fundamentals that all CRMs typically have, companies generally use Sage CRM to solve different process problems that they have. It has excellent automation features that can be used to control how information flows through different individuals or different departments. For example, how Jobs, Customer Service issues or Opportunities are managed.

9. Sage CRM is not hosted by Sage. Rather the client hosts their own instance. This distinction means that, unlike competing systems (all other CRMs), Sage gives the client ultimate control and ownership of the system and their data.

Section 3: Quick Training Links including videos.

Below is a listing of links including short training videos that will help you understand Sage CRM. Feel free to forward any of these links to any interested parties.

1. A general overview of Sage CRM: Sage CRM Overview – My CRM Manager
2. Listing of the accounting integrations and the details of those integrations: Sage CRM and Accounting Integration – My CRM Manager
3. Integration with MS Outlook: Outlook Integration (Accelerator 2021) – My CRM Manager
4. Sage CRM pricing calculator (for estimates only): Cost for Sage CRM - My CRM Manager - Pricing Calculator
5. Here is a link to the hardware/software requirements for Sage CRM: https://mycrmmanager.com/wp-content/uploads/SageCRM_2021R1_HardwareSoftwareRequirements_EN.pdf Our suggestions for minimum requirements for systems that will ultimately host 10ish users are: RAM = 16GB and Processor = Equivalent to Xeon Series Quad Core with a minimum frequency > 2.8 GHz. Additionally, this Pre-Installation Checklist for Sage CRM outlines what the CRM team will require in terms of access and cooperation from your IT team.

Section 4: What is the profile of a company that invests in Sage CRM?

While companies that use Sage CRM come in different shapes and sizes, the sweet spot for Sage CRM seems to be with businesses that require 10 to 30 users in the system. Remember – the average installation of Sage CRM has 12-users.

Key points that qualify this lead as a good prospect.

✓ Actively looking for a system that would manage data for at least 7 users.
✓ Have used a CRM in the past.
✓ You are speaking to the owner (or equivalent).
✓ Interested in a CRM that can be hosted on their network (not all companies want this, but some really do)

Key points that would disqualify this lead from being a good prospect.

▪ Only would need 5 or less users.
▪ Less than $3M in annual revenue.
▪ Total staff of less than 15.
▪ Only want a system that is hosted by the publisher.

*Sage CRM is not for all companies in the SME market. The reality is that smaller organizations simply cannot justify something as advanced as Sage CRM. If you think this candidate is too small but they insist on learning more, redirect them to the calculator and then ask them if they still want to learn more (wink).

Section 5: Questions you might be asked.

Q1: Can my customer service team use this to track issues?
A1: Yes, absolutely

Q2: Does Sage CRM integrate with MS Outlook?
A2: Yes, Sage CRM has a very strong integration with MS Outlook.

Q3: Can we try it out?
A3: Re-direct them to an expert asap.

Q4: What does Sage CRM include?
A4: There is no concept of tiered pricing with Sage CRM. It is a single per-user subscription price which enables the client access to the entire Sage CRM toolkit.

Q5: How long does it normally take to deploy Sage CRM?
Q5: Every project is different, but you can say 'a few weeks'.

Q6: How much does Sage CRM Cost?
A6: Do not get sucked into this vortex. Quoting properly on Sage CRM takes years of experience. You can direct them to the calculator, and also mention there is a Test Drive and Quick Start Implementation Package.

Q7: Does Sage CRM integration with Intacct?
A7: Yes.

Section 6: How you can move the deal forward

If you believe the company you are speaking to if qualified (see above), the very best chance you have is to get this over to a Sage CRM expert. To submit a qualified lead, you can use this form Contact an expert Sage CRM Consultant – My CRM Manager or send an email to inquiries@mycrmmanager.com.

If you are unsure of anything, you can message me in Teams or send me an email and I can jump into a session with you to go over whatever your questions are. You can use dan.cousins@mycrmmanager.com.