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**Headline News**

A recent survey commissioned by Sage Software reveals that small and mid-sized businesses should use their CRM database as a tangible asset and a differentiator to obtain the best value from their business at an exit, succession, or transition.

Having customer data in a single CRM system ranked as a significant business and financial asset for 70 percent of respondents with exit strategies.

**Sales Management Tools**

**A**s a sales manager, you are awarded much of the credit for your company's financial success, and much of the blame for any financial woes. With such responsibility, you can use a powerful tool working for you. A powerful tool that allows you to record, monitor, manage, and analyze the full range of sales activities initiated by and engaged in by your sales team. That tool is the Sage SalesLogix customer relationship management (CRM) solution. Here we highlight the many features of particular value to sales managers.

**Manage Opportunities**

Leads and opportunities generated by your company's marketing engine must be brought into the Sales SalesLogix database so that they can be acted upon. The more quickly and accurately these leads make it into your database, the faster your team can make contact and begin the sales process.

Your Sage SalesLogix software includes features that make it very simple to retrieve leads from multiple sources and add them to your Sage SalesLogix database. For example, you can use a simple, standardized Web form to record these leads and merge them into the Sage Sales-

Logix database. You also can simply import leads from a file.

Rather than import leads into the same data tables as your existing Accounts and Contacts, new leads can be imported into a separate Leads database so they can be properly qualified before converting them to Accounts or Contacts. Note that the Leads functionality will be added to the Web client in early 2008.

As your sales team creates and updates opportunities you easily can monitor the process using the **Opportunity Snapshot** and various reports and views. Your team can even e-mail key statistics to you on a weekly basis. Within the Sage SalesLogix solution you can automatically track leads from campaign, through the opportunity cycle, to close. Using **Opportunity Statistics**, you can view the probability of close, the products that are being considered, the lead source, status,

and even the competitors involved.

**Calendar Scheduling**

What is your team doing? Will they be in the office for the sales meeting you're planning next week? Don't overlook the importance of the integrated calendar and activity scheduling features that are part of the Sage SalesLogix solution. You



Sage SalesLogix reports offer you and your sales force instant access to revenue forecasts, trends, and other details needed to close more sales.

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**Nurture Marketing**

See page 4 for more info!

Compliments of:



# Sales Management Tools CONTINUED

can query each team member's calendar, schedule tasks and activities for any member, and generally monitor your team's activities.

## Dashboards

The Dashboard feature within Sage SalesLogix can be a sales manager's best ally. Through these customizable data centers, you can view performance metrics, diagnose key issues, and identify opportunities from a single location. You'll have access to current listings of top customers, top sales representatives, and largest opportunities. Graphs and charts make the data easy to digest, and provide at-a-glance information you can act on. And each member of your team can have their own version of the Dashboard, displaying information specific to their role.

## Business Alerts

Busy sales managers will benefit from utilizing Sage SalesLogix KnowledgeSync, a powerful business alerts tool. It can be configured to send you an e-mail when an opportunity over a certain dollar amount is created, or when any opportunity is won or lost. You also can use KnowledgeSync to notify your sales representatives when they've been assigned a new account, or send them a reminder when there has been no activity on an account for a certain number of days.

## Consistent Communication

Consistent branding of corporate communications sets a professional tone. You can use Sage SalesLogix to set up various e-mail and letter templates that, while personalized with your team members' contact information, retain a consistent look and feel.

## Sales Process Automation

Sales methodology experts agree that a consistent, defined approach to guiding a lead through the sales process is the most effective. The Sage SalesLogix software is both exceptionally powerful and extensively customizable and allows you to adapt its features to your sales process.

With the Sage SalesLogix solution, you can create custom processes based on product line, deal size, territory, or lead type and then automate sales activities and assign the objectives and results required at each stage.

You can configure a variety of sales processes to tailor your approach to leads from different sources, or those with a different initial level of interest. Each process can lead to multiple sub-processes. In practice, you may continually fine tune these processes to match the reality of each situation. The benefit comes from your ability to manage, oversee, and influence what goes on during the sales cycle, making your team more effective and accountable.

Your Sage SalesLogix software can adapt to changing processes. For example, it's a simple task to realign sales territories, create new teams, and re-assign account ownership with Sage SalesLogix.

## Forecasting Sales

As a sales manager, your ability to accurately forecast revenue for upper management may be your single most important task. In order to make accurate sales-related forecasts, you must have confidence in the data coming in from your sales team.

With the Sage SalesLogix solution, you have a number of attributes to study to allow you to make better, more accurate forecasts. Often it takes different views of the data to give you an idea of overall trends. You can segment opportunities by Account Manager, Region, Lead Source, or Probability of Close, to get a clear picture of what's in the pipeline.

Instant, graphical, on-screen views of the data make quick queries a snap. You also can export the data to Excel or launch various opportunity reports on the spot.

## Using Groups

Groups are a helpful way to efficiently manage your team's workflow by allowing them to work with a specific subset of data. Use groups to select data to print on reports; launch a campaign targeted at a group; and to send mailings, e-mails, and faxes using the mail merge feature.

## Marketing Campaign Analysis

While the development and execution of marketing campaigns may not be under your direct jurisdiction, you certainly need access to the results of those campaigns. How many leads have come in related to a campaign? How many sales have been made as a result?

Sage SalesLogix is designed to allow your company to collect detailed data concerning campaigns. You'll be able to analyze key campaign metrics, determining which ones work—and which do not. Armed with this information, you can better calculate what type of campaign and what level of marketing it takes to increase your sales numbers.

## Powerful Reporting

Timely, informative reporting is crucial to every sales manager. Nothing beats a hard copy of pertinent data for discussions with staff and the management team. The Opportunities By Account Manager report is an indispensable tool for analyzing each member of your team's workload.

Through Sage SalesLogix reports you can easily analyze campaigns, review pipeline efficiency, consider revenue by lead source, and more. The reports are clear, informative, and easy to use, offering you and your sales force instant access to revenue forecasts, trends, and other details they need to close more deals.

## Competitor Tracking

In a tight market, you must focus on the strategies that allow you to beat the competition. Your Sage SalesLogix solution allows you to record competitor product information as well as each competitor's strengths and weaknesses. Track the competitors' sales team members, sales strategies, and the reasons for each win and loss. Use Notes and record strategies that will give your team the edge, not just in the current opportunity, but for every future match up.

Sage SalesLogix offers every sales manager the tools they need to effectively manage their responsibilities. Call us with your questions. ★

# Become A Best-In-Class Sales Organization

The Aberdeen Group recently published a paper entitled *Sales Effectiveness: Getting Sales Back to Selling*. Based on its survey of 200 companies, the paper highlights the habits adopted by best-in-class companies, and contrasts those with the practices of average and laggard companies. We think it's worthwhile to summarize some of the findings of this paper with the goal of helping you improve the sales effectiveness of your organization.

## How To Become Best-In-Class

The Aberdeen Group used key performance indicators (KPI) to group the survey respondents into categories. The top 20 percent they refer to as Best-in-Class, the middle 50 percent are labeled Average, and the bottom 30 percent are called Laggard. Here are the KPI statistics for the Best-in-Class group:

- ▶ 96 percent reported year-over-year improvements in Bid-to-Win performance
- ▶ 80 percent reported year-over-year improvements in Order/Quote Quality performance
- ▶ 86 percent reported year-over-year improvements in Lead-to-Opportunity conversion rate performance

What steps can you take to become a best-in-class sales organization? The Aberdeen Group made several suggestions, including the following:

## Centralize And Eliminate Duplication

The paper noted that Best-in-Class sales organizations are working to eliminate spreadsheet-style and ad-hoc reports to track their sales process. Instead they turn to centralized and integrated systems for their sales management information. They recognize that with sales information scattered throughout the organization, residing in spreadsheets, databases, e-mails, or other software systems, you end up with multiple versions of the truth, and reconciling those versions takes time and effort away from the sales process.

## Integrate Sales Processes With Back-Office Systems

A Best-in-Class company looks to minimize administrative overhead through integration of its sales and back-office systems. Sharing

item pricing, orders, and quotes increases the effectiveness of its sales team and gives more time to focus on the job of selling.

## Invest In Formal Sales Methodologies

Due to its wide adoption, Contact Management software alone is no longer the competitive advantage it once was. To differentiate themselves from the competition the majority of the Best-in-Class sales organizations are moving to a formal sales methodology such as a feature-rich Customer Relationship Management (CRM) solution. The CRM solution you choose should provide: automated workflows to help ensure consistency; the ability to generate quotes and orders; sophisticated forecasting tools; and the ability to integrate with information tools such as Microsoft Outlook and Excel.

Sage SalesLogix is an ideal tool to help you become a Best-in-Class company. It provides a centralized database and helps you eliminate duplication. It is easily accessible by your entire team—whether in the office, connected remotely, or working offline. Sage SalesLogix integrates with several back-office accounting solutions including: Sage MAS 90 and MAS 200 ERP, and Sage MAS 500 ERP. To maximize your team's effectiveness, Sage SalesLogix integrates with Microsoft Outlook. In addition, Sage SalesLogix allows you to configure and customize workflows to fit your company's specific sales model.


## Overcome Obstacles To Sales Effectiveness

The Aberdeen Group paper identified two top pressures or challenges to increasing sales effectiveness based on its survey findings: longer sales cycles and low sales productivity.

To address these challenges, Best-in-Class firms are employing a number of different strategies. One strategy is to increase the sales representatives' use of information by improving their knowledge of products and customers. Another strategy is to deploy sales processes to help sales representatives leverage their product and customer knowledge, thereby shortening the sales cycles and increasing sales win rates.


Sage SalesLogix is a sophisticated tool that can help your organization overcome these challenges. With Sage SalesLogix, your sales representatives have ready access to a wealth of information related to account, contact, and opportunity records. Document handling features allow you to associate product manuals, price sheets, or white papers with an opportunity to make detailed product information instantly available. A formally documented sales process facilitated by the workflow functionality in Sage SalesLogix helps shorten the sales cycle by ensuring a standard, consistent approach.

## Learn More

The paper, *Sales Effectiveness: Getting Sales Back to Selling*, by the Aberdeen Group is full of information and statistics; we've given just a brief summary here. If you'd like to receive a copy of the paper or learn more about Sage SalesLogix, please give us a call. 

## Tips & Tricks

Your administrator can allow members of your team to share calendars. Here's how:

1. Open the Administrative Workstation
  2. Click the *Users* icon on the navigation bar
  3. Highlight the user's profile
  4. Right-click and select *Edit User*
  5. Choose the *Calendar* tab
  6. In the *User can access only the following calendars* section, click the *Add Users* button.
  7. From the *Select User(s)* window, select the appropriate user and determine the level of access desired for that calendar (Add, Edit, Delete, Sync)
  8. Click *OK* and exit the user's profile
  9. Log on to the Sales Client as the user
  10. Open the Calendar. In the upper right-hand corner of the Calendar window right-click and select *Other User's Calendar*
  11. In the *Select Users to View* window click the *Add* button
  12. Highlight the desired users
  13. Click the *OK* button twice
- Call us if you need assistance. 



## In The Spotlight Nurture Marketing With Sage SalesLogix

The concept of nurture marketing is not new, but the principles behind it are as valid today as they ever were. The term nurture marketing simply refers to consistent, low-key marketing efforts designed to build trust and name awareness among your prospects and clients. You want them to think of your firm when a business need your firm can solve arises. In order to ensure that happens, you have to position your firm and its staff as trusted advisors—not simply salespeople. Here's a brief outline your organization can use to launch and maintain an effective nurture marketing campaign.

### Segregate Your Audience

Direct your nurture marketing efforts to both customers and prospects, and to subsets within those groups. A customer who hasn't purchased from you in ages needs a different message than one who purchases regularly. Prospects in different stages of the pipeline or sales funnel might receive different messages, each targeted to their level of interest.

The beauty of Sage SalesLogix is the ease in which you can segregate your databases of customers and leads. This allows you to target your marketing efforts geographically, by salesperson, by past purchases, by lead source, by probability of close, or by dozens of other criteria.

### Choose Materials With Your Audience In Mind

Before launching any campaign, take the time to consider what your audience may want from you. Sounds simple, but companies too often assume that their own product or service information is the only possibility for marketing collateral. Industry white papers, case studies, invitations to Webcasts, or a reprint of a useful article all make excellent nurture marketing collateral by providing real value to your prospects.

Ensure that all of your communications have a consistent theme that ties them together and associates them with your firm. Include your logo and your company tag line—it helps remind your audience that they already know you.

### Track Your Activities

Using Sage SalesLogix as the starting point for all your marketing activities ensures you keep a record of each communication. By analyzing what you sent, when, to whom, and the associated responses, you begin to develop a picture of what kinds of activities work for various subsets of your client and prospect database. This information allows you to define future marketing activities, giving every contact more of what they want—and less of what they don't want.

### Be Persistent

You want to give your prospects ample opportunity to enter and move within your pipeline. Nurture marketing can serve as a tool to help you to gauge their interest level. For industries with complex sales cycles, it will take multiple contacts over a protracted period of time to even get a prospect to say, "I'm willing to talk to you again." Many market researchers suggest it takes between 10 and 20 contacts to prompt a reaction in an audience.



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### Build Loyalty

Turning prospects into customers is important. Perhaps an even more crucial element in your company's success is retaining the customers you have. Your current customers are your most cost-efficient source of new revenue; typically, the cost of the sale is lower and the sales cycle is shorter. In many industries, particularly service industries, up to 70 percent of a company's revenues come from existing customers.

Nurture marketing helps build customer loyalty and goodwill, and is an excellent way to introduce new products and services of potential interest to your customers.

### The Payoff

The simple fact is that persistent marketing works. By consistently putting your message and your company in front of prospects, you increase awareness of your solutions, and increase the chances you'll be called on when a need arises. Nurture marketing is an effective method of keeping your name in front of customers and prospects alike. Do it well and enjoy the results. ★