Sage SalesLogix | Marketing Solutions

Using your marketing budget and resources wisely means launching effective, timely marketing campaigns across all of your sales channels. Sage SalesLogix provides full-scale marketing campaign management capabilities, including powerful lead management, targeted customer segmentation, multi-channel marketing communications, budget and ROI tools, and business analytics tools—all designed to target your most profitable prospects and customers, shorten your sales cycle, and increase marketing efficiencies.

Benefit from Lead Management That Matches Your Unique Preferences

Robust lead management capabilities help you efficiently perform the complex task of importing and processing leads—ensuring that hot leads are quickly routed to the appropriate person or team! Easily import leads from trade shows or purchased lists; perform lead de-duplication; and qualify leads so only clean, viable leads are captured within Sage SalesLogix. Leads can be automatically distributed to your sales teams so they're acted on as soon as possible. You can even assign activities with leads, such as scheduling a meeting, phone call, or a to-do task; record notes; perform mass actions; and more to ensure the appropriate action is taken, driving the lead closer to an opportunity or sale.

And, whether a lead, contact, or account has responded to a campaign, clicked on your Web page, requested literature, or discussed a product or service with an employee, every instance of an expressed interest can be captured in Sage SalesLogix and pursued for future campaign and sales activities.

- Increase marketing effectiveness by managing every aspect of your marketing campaigns in an easy-to-use interface.

- The step-by-step Import Leads Wizard makes it easy to import and manage leads and automatically distribute hot leads fast!

Build and Launch Targeted, Multi-Channel Campaigns

Create and manage targeted, multi-channel campaigns that bring in new leads and new sales. You can select the criteria of your ideal target prospect, then segment your customer and prospect lists into unique groups. Define campaign stages and target your prospects through multiple mediums, such as HTML e-mails, post cards, and telemarketing campaigns. You can even export your target list to Microsoft® Excel®, and e-mail the list to your mail house right from Sage SalesLogix or send it to the appropriate department for a telemarketing campaign. Once a campaign is launched, you can manage stages and tasks and track responses. Large-scale e-mail marketing campaigns can be executed using compatible marketing services integrated with Sage SalesLogix. Response data is automatically populated in Sage SalesLogix for tracking and analysis.

Measure ROI for Maximum Effectiveness

Once campaigns have been launched, you can easily gather the data you need to make strategic decisions. View budget information, response data, and cost metrics to help you understand the effectiveness of current plans and better plan the logistics of your next campaign. Integrated, flexible reports enable your marketing team to analyze key marketing campaign metrics such as budget variance, win rate, sales potential, and more—and filter by product, time period, or lead source.

Using Sage SalesLogix Visual Analyzer, an advanced business analytics tool, you can view a summary of all current marketing campaigns and visually understand which campaigns have the most responses, best conversion rates, and more. You can even see sales trends to understand which products and services are struggling so you can adjust upcoming campaign strategies if necessary.

Understand Why You're Winning and Losing Deals

View valuable win/loss data to redefine product strategy, messaging, and your marketing deliverables strategy if necessary. Sage SalesLogix enables teams to capture win/loss data and competitor information, and provide comments for further insights. Armed with this information, you can understand why you're losing deals and to which competitors, so you can adjust your messaging and campaign strategies accordingly.

> "With Sage SalesLogix we are able to direct our marketing messages to specific groups of prospects and tailor our message to each group."
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> — Shannan Friedman, Marketing Manager, Equisys, Inc.
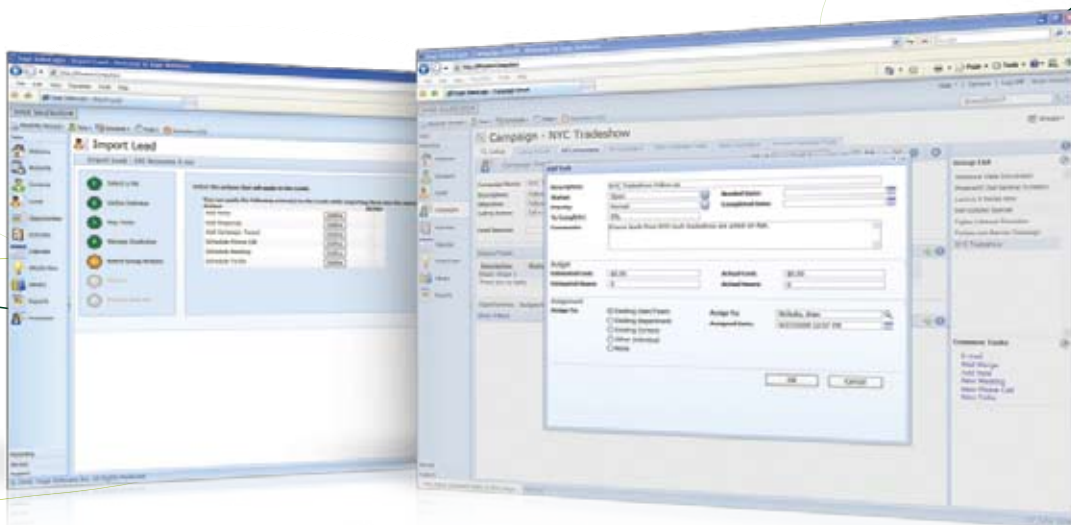
- Perform group actions and assign activities to leads upon import, increasing marketing efficiencies

- Add stages and tasks to campaigns to ensure all steps are taken—ensuring campaign success.

FEATURES

Campaign Management
- Design, execute, and track all campaign activities in one location.

Lead Management
- Import leads from Web forms, tradeshows, seminars, or purchased lists.
- Track leads at every stage, from prospect through closed sale.
- Perform lead de-duplication to ensure clean data so customers are not getting hit with the same campaign twice.
- Automatically assign "hot" leads based on your business rules so sales teams can act on them fast.
- Perform mass actions* upon import and assign activities for leads—increasing marketing efficiencies.

Web Lead Capture
- Capture prospect information via a company Web site and import lead data.
- Gather valuable demographic data for use in segmentation and offer development.
- Campaign Response Tracking
- View response data in real-time to analyze the impact of campaigns in progress.
- View or add campaign information or responses from within account or contact records.
- Capture information at the individual opportunity level and have it roll into management view.

Campaign Task Management
- Coordinate and track the stages and tasks critical to executing effective campaigns.
- Schedule task owners and assign dates, due dates, and budget for each task.
- Manage budget and workflow for employees and external vendors.

Lead Qualification
- Create unique qualification checklists for different products or services.
- Click to convert qualified leads to new sales opportunities.
- Merge duplicate leads with existing contacts and accounts.
- Workflow Automation
- Streamline marketing and sales campaigns by automating standard tasks.
- Assign custom processes, such as "Trade Show Lead," to campaign target groups.
- Automatically archive letters, e-mails, faxes, or proposals within customer account records.

Campaign Reporting (ROI)
- Analyze the effectiveness of marketing efforts (ROI).
- Examine campaign data responses, associated revenue, and product detail.
- Evaluate potential vs. actual returns for each lead source, region, or media type.
- View campaign data via Crystal Reports® and adjust marketing strategy.
- Leverage advanced business analytics tools, such as Sage SalesLogix Visual Analyzer, to understand which campaigns have the most responses, best conversion rates, win/loss data, and more.

Budget and Revenue Tracking
- Gain critical visibility into campaign budgets and direct revenue impact.
- Assess potential revenue for campaigns launched against target groups.
- View revenue in real-time as opportunities linked to campaigns are updated.
- Track forecasted versus actual budgets, including cost metrics such as cost per lead.

Segmentation and Groups
- Deliver targeted marketing messages or sales offers to select customer segments.
- Enable sales reps to quickly create groups for personalized sales campaigns.
- Segment customer and prospect lists with user-friendly filtering tools.
- Export data to Microsoft Excel for additional analysis.

Calendar and Activity Management
- Manage schedules and keep track of marketing activities and events.
- Track phone calls, meetings, to-dos, events, and literature requests.

Customer Communications/Mail Merge
- Communicate effectively with customers and prospects via multiple mediums.
- Create custom HTML e-mail templates, then personalize and send using Mail Merge.
- Archive campaign letters, e-mails, or faxes within customer account records.
- Attach marketing literature, product information, and other resources from the Library.
- Launch full-scale e-mail marketing campaigns by uploading lists to compatible e-mail marketing services and track response data automatically within Sage SalesLogix.

Marketing Resource Library

- Maintain a central repository for marketing information, materials, and tools.
- Store product information, sales collateral, manuals, pricing, and presentations.

Application Integration

- Manage contacts, e-mail, and calendars using Microsoft Outlook®, Microsoft Exchange, or the built-in Sage SalesLogix e-mail solution.

Windows, Web, and Mobile

- Synchronize rapidly and work while disconnected (using Windows®, Web, or Mobile clients), or work while connected over a network or the Web.
- Utilize BlackBerry® or Windows Mobile® (Pocket PC and Smartphone) for quick access to customer data in the field.

"We've built AIS into a $50+ million company and are aggressively expanding our distribution network. With such rapid growth, the ability to manage our sales, marketing, and distribution partners is almost solely thanks to Sage SalesLogix."

— Mike DuGally Vice President of Sales and Marketing, AIS (Affordable Interior Systems)

About Sage SalesLogix

Your highest priority is to grow your business, and your business tools should help you achieve that goal. Sage SalesLogix provides a complete view of customer interactions across sales, marketing, customer service, and support so your teams can collaborate and respond promptly and knowledgeably to customer inquiries and opportunities. With flexible access options, powerful process automation capabilities, and a highly customizable platform, Sage SalesLogix is a comprehensive solution that will help you achieve stronger sales and a more successful business, now and into the future.

About Sage CRM Solutions

Sage CRM Solutions is a portfolio of market-leading applications consisting of ACT! by Sage, Sage CRM, and Sage SalesLogix. Over 56,000 organizations and 3.1 million users worldwide rely on Sage CRM Solutions to develop profitable, long-term business relationships.

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