



CRM Software Review



About this Review

Thank you for requesting this executive summary of ISM's comprehensive CRM Software Review for Sage CRM. Since 1989, ISM staff has tested dozens of software packages annually from CRM vendors around the world. Each review is currently based on 179 criteria, drawn from input we've received from senior executives and sales, marketing and customer service personnel. ISM receives no money from any vendor it reviews, to ensure 100% objectivity. Vendors must fully demonstrate their functionality for each criterion.

About ISM

Since 1985, ISM has created & implemented strategies to delight the customers of best-in-class organizations worldwide. ISM provides solutions that maximize user-adoption, ensure seamless collaboration between customer-facing functions and enhance customer engagement. We combine strategic vision with powerful technologies and tools to deliver actionable strategies that lead to an optimized customer experience, improved customer service, better-calibrated marketing programs and ultimately, to increased customer acquisition, retention & growth. Let us review your current customer-facing technology programs and activities, and ready your organization for 2030 and beyond.

Contact us for the full, detailed 20-page CRM Software Review for Sage CRM or any of 30 other major CRM applications.

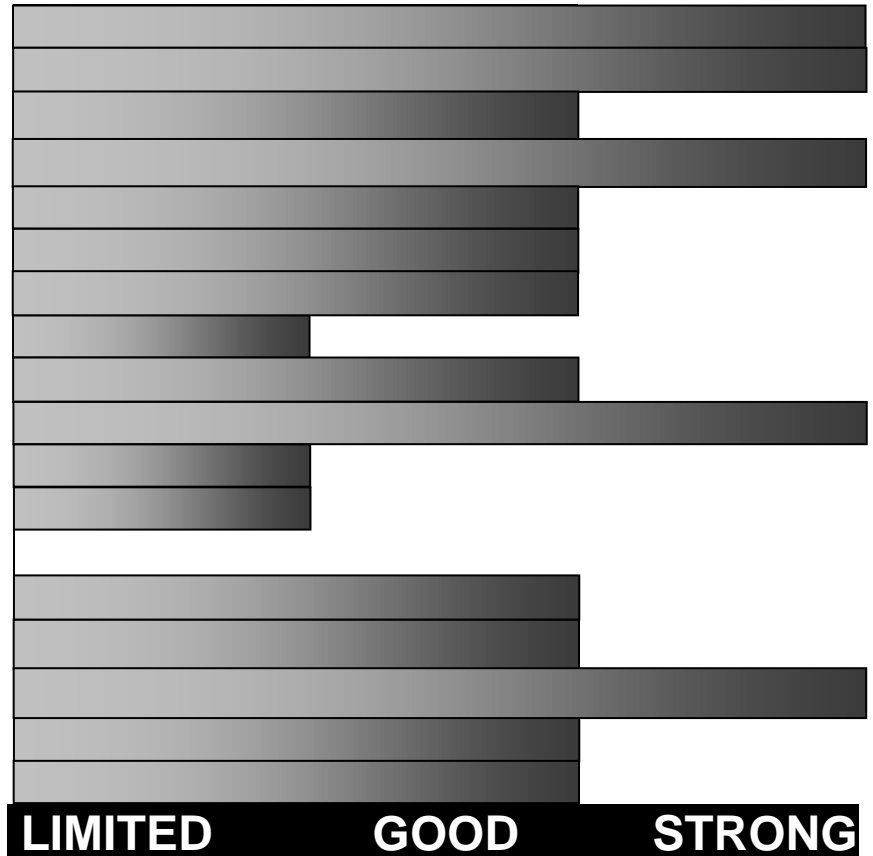
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Sage CRM at a Glance:

Business Functions

Contact Management	✓
Account Management	✓
Sales Management	✓
Time Management	✓
Customer Contact Center	✓
Customer Service	✓
Telemarketing/Telesales	✓
Marketing	✓
Lead Management	✓
Business Analytics	✓
e-Business	✓
Project Management	✓
ERM	
Field Service	✓
Mobile CRM	✓
Social CRM Functionality	✓
Real Time Features	✓
User Friendliness/Support	✓

Evaluation of Business Functions



Strengths:

- Contact management
- Account management
- Time management
- Business Analytics
- Sales cycle analysis
- Territory alignment/assignment
- Customer self-service
- Incident reporting
- Call statistics/reporting
- Auto-dialing
- Campaign management
- Pre-defined reports
- Dashboard interface

Weaknesses:

- Lack of ERM
- Limited marketing
- Limited e-Business
- Limited project management
- Lack of literature/samples management
- Lack of return authorization management
- Lack of real time analytics
- Lack of predictive modeling tools

Executive Summary

Sage CRM is a Web-based CRM application with strong functionality in contact, account and time management and business analytics, along with good functionality in sales management, customer service, customer contact center, field service, telemarketing, real time features and lead management. The solution is accessible from any computer that supports Internet connectivity.

Screens and functionality that a user sees are based on user role and territory security options. The system administrator can set up user access rights and roles. Views change based on what hyperlinks the user chooses (i.e., if user chooses a contact, the view changes to reflect contact information at the top of the screen and company tab/folder at the bottom of the screen). The MyDashboard function allows the user to select which components, reports, tabs, etc. that they would like to see on the screen. The MyPreferences function permits users to select their login and session preferences. A 'Recent' button can be clicked to display a brief snapshot of the most recent elements used within the system. The user can access a Groups feature to organize list of records with common characteristics such as sets of companies, people, opportunities, etc. for mailers, mass emails, meeting scheduling, etc.

The MySage CRM portal permits the user to set up links to information in the Sage CRM database and links to external Websites. Additional functionality for marketing is available via native integration with SwiftPage and MailChimp.

Configuration of Sage CRM elements is enhanced due to the graphical and picks list options for modifying the contents of forms, lists, screen objects, etc. Also, the data import tool can be used to map standard file formats such as CSV as well as MS Excel, Goldmine and Act!.

Sage CRM is a user-friendly package primarily because of its Website screen layout. Nevertheless, ERM functionality is lacking. Marketing, project management and e-Business functionality are furthermore limited.

Contact management, Account management, Sales management

The contact management features are in a list format containing many pre-defined fields and the ability to create an unlimited number of user-defined fields. Account management features are available in a similar list format. Pre-defined tabs for marketing, notes, opportunities, incidents, people, addresses, library, orders, maps, phone/Email and team are available within an account profile. The Related Companies tab can illustrate business relationships with other companies in a hierarchy chart diagram. Sales opportunity profiles can be accessed via the Opportunities tab. Sales reps can be assigned to a sales opportunity via the Team tab. The user can access a built-in sales methodology with these stages: start, lead, qualified, quoted, negotiating, sold, closed, demo and reassign. Each sales stage can be drilled down upon for detailed information. The sales methodology is built-in within the Sage CRM opportunity workflow. The sales methodology can be changed by the System Administrator via drag and drop actions within the workflow. The System Administrator can furthermore set up automatic territory alignment/assignment by various criteria via customization of the Sage CRM workflow.

Time management

Time management tools are available via the native calendar or via bi-directional integration with MS-Outlook. Tasks can be scheduled and assigned to a single user or a group of users via the native calendar. The user can schedule activities in the calendar with an icon to indicate the type of activity that is being scheduled (e.g., phone call, meeting, etc.). Alarms in the form of pop-up windows are also available with a snooze function.

Customer service

Customer self-service functionality provides the capability for the customer to access his/her Sage CRM account records and any related sales opportunity information via User ID and passwords access over the Internet on the Sage CRM Customer Service portal. A Call Me Now button enables the user to notify that he/she desires contact by a customer or sales rep. Customer service features are generally available via customization of the Sage CRM workflow for incident assignment and escalation. Field service functionality is available via synchronization with wireless devices (e.g., iPhone or Android devices).

Telemarketing/Telesales, Campaign management

Telemarketing features are enhanced with the ability to assemble a call list by user-defined criteria via the Build List feature. Scripting can be customized with specific questions and a choice of answers available in drop-down lists, checkboxes and blank fields. Dynamic branching scripting is not available. Auto-dialing capabilities can be accessed via the add-on Sage CRM CTI module. Campaign management functionality is offered via a built-in campaign profile and a pre-defined Waves tab to set up campaign stages.

Lead management

Lead management features include the ability to de-duplicate and standardize lead information imported from third party databases via the Data Upload feature. Partnership related information can be accessed via User ID and password access over the Internet on the Sage CRM Partner portal. Numerous pre-defined report templates for activity reporting, sales opportunities, sales metrics, call reporting, etc. are available in the built-in Sage CRM reporting package. For example, the user has the ability to drill down on pipeline elements in the opportunity folder.

Contact

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Company Profile

YEARS IN BUSINESS	34	PRICE – MULTI-USER	See Pricing Section
NUMBER OF EMPLOYEES	12,833	SERVER	See Pricing Section
LICENSED SEAT/USERS SOLD – LAST 12 MONTHS	Vendor Disclosed		
TOTAL NUMBER OF CUSTOMERS	12,000 companies		
LANGUAGES AVAILABLE	English US, French, German, Spanish and Chinese are fully supported		
LIST OF RESELLERS	Sage operates via an indirect channel of over 25,000 certified business partners.		

Pricing (per user/seat)

The average price per user is \$920 for the perpetual license of the on-premise version of Sage.

The average price per user is \$28/user/month for the subscription license of the on-premise version of Sage.

A hosted version of Sage CRM is priced at \$45/month/user.

Server: The cost of the server is \$3,995.