Focused Sales Management with the Sage 200 Suite

Equipping your sales team with the complete customer information and the necessary tools to enable them to do their job effectively is very important. Sage 200 empowers organisations to sell effectively. Easy-to-use, Sage 200 provides sales staff with instant access to calendars, accounts, reports, pipelines, contacts and call lists, empowering sales people to sell. All sales information is stored, tracked and reported providing organisations with meaningful and up-to-date information on the performance of the sales team.

The information is displayed on the CRM interactive dashboard from where you can control and manage all activities. You can choose to use the pre-installed sales dashboard available out-of-the-box or customise your own dashboard to create a bespoke workspace to suit your needs.

Graphics provide at-a-glance information to sales reps and sales managers on how they are doing at any point in time. As a result of tight integration with financial and commercial data sales, staff have a complete 360 degree view of the customer across front- and back-office departments.

In addition, you can give your people access to data on the move, via mobile devices, so that being away from the office doesn't mean being out of touch.

With Sage 200, real-time sales opportunity analysis is provided instantly. Sage 200 provides a snapshot of all opportunities within the sales pipeline, allowing sales teams to effectively analyse and manage deals at every stage. The sales process is automated, streamlining your business and enabling better business management. The most up-to-date and complete customer information is instantly and easily retrievable through the interactive dashboard helping you to have a better view of your customer at all times.

The Interactive Dashboard

Sales teams work more efficiently thanks to the interactive dashboard. This is an intuitive and customisable workspace from which you can manage all your daily tasks and activities for maximum productivity.

The interactive dashboard can be customised to display relevant information from within Sage 200 CRM or feeds from websites. A pre-installed sales dashboard is available out-of-the-box or you can customise your own dashboard or team dashboard with content that is relevant to you and your role. The sales team can monitor your opportunities and pipeline, manage your calendar and appointments, and identify powerful networking opportunities from LinkedIn® all from this customisable workspace. This removes the need for you to switch between screens, maximising the efficient use of your time and boosting productivity. Content and layout can be customised quickly and easily using drag and drop capabilities delivering a dashboard that meets your individual requirements.

Benefits Snapshot
Improves transparency in the sales pipeline
Enhances sales forecast accuracy
Monitors progress against quota
Enables quarterly sales performance monitoring
Leads to shortened sales cycles
Increases prospect-to-customer conversion rate
Delivers metrics on most valuable customers
Improves consistency across the sales organisation
Enables more effective identification of new market opportunities
Maximises cross and up-sell opportunities
Eliminates manual/duplicated sales processes
Improves team collaboration on opportunities
Decreases time spent on administrative tasks
Improves prospect targeting
Provides visibility on sales team performance including identifying sales opportunities and pipeline potential
Increases visibility on customer interaction across departments and activities
Automates proposal and quotation processes
Maximises the use of financial information from the back-office system
Reduces time spent in the office on sales administration (more time on sales calls)
Increases sales effectiveness through the ability to access customer and opportunity information remotely
Boosts sales team productivity by delivering a single view of leads, opportunities, tasks and activities on the interactive dashboard

Management of Opportunities and Leads

Using Sage 200 sales staff can track leads from first contact to final sales closure. This ensures that time and resources are invested into the deals that are most likely to close and enables your sales team to easily identify and recruit new customers and resell or up-sell to existing accounts. Leads can be escalated and reassigned easily from the interactive dashboard, follow-up activities can be automated and field-level security is a simple and straight-forward process. It also guarantees that leads are handled by the employees most qualified to assist the client and only relevant parties are privy to information. Sage 200 permits sales reps and managers to effectively analyse and manage the sales pipeline, with the ability to see and report on leads, opportunities and proposals at a glance.

Sales Forecasting and Reporting

Sage 200 provides point and click reporting and graphs along with accurate and timely forecasts which are accessible by sales representatives and managers alike. This enables easy sales forecasting and reporting and provides sales teams and management access to data for immediate analysis and decision-making.

Custom reports can be created on-demand using the reporting wizard for real sales performance insight. It is also possible to use system default reports or easily create new reports with the aid of a reporting wizard.

Sage 200 provides detailed business insight data as well as graphical interpretations on the state of the business at any moment in time allowing businesses to strategically plan and gain insights on future performance.

This powerful analytical information can be displayed on the interactive dashboard in a graphical format that makes sense to senior sales executives; allowing them to monitor team performance, identify issues and make strategic decisions; all in real-time. Dashboards can also be fully customised to deliver even further strategic value to senior decision-makers.

Quotes and Order Generation

With Sage 200, the most up to date quotes are delivered with access to the latest product information. This maximises efficiency, reduces the margin for error and professionalises communications with customers and prospect customers. Sage 200 has functionality to automatically generate sales proposals and quotes using predefined templates enabling sales executives to generate compelling, comprehensive and accurate proposals quickly and efficiently.

Territory Management

With Sage 200, assignment rules automatically route leads to the relevant sales representatives based on territories. It is possible to create new teams and re-assign ownership of teams as well as view marketing campaigns, response rates and associated sales revenue by territory. This enables insight into sales effectiveness and performance by territory.

Sales Process Automation

Vital customer and prospect information can be retrieved quickly and easily. Time is organised and administrative tasks are reduced to a minimum. As the sales process is automated to enable sales staff to concentrate on their primary purpose which is selling. The in-built workflow can be followed out-of-the box or customised to reflect your business process. The automation in Sage 200 means that all sales staff follow the same steps, ensuring no opportunities ‘fall through the cracks’. The sales process can be structured to suit your internal business process for maximum effectiveness. Sage 200 also delivers periodic messages to sales managers summarising critical opportunity and forecast information for their direct reports. This ensures business opportunities are always retained and worked on. The sales team can control and manage their working day from the interactive dashboard, reducing the need for them to switch between screens and maximising use of their time.

Calendar and Diary Management

Sage 200 provides sales staff with a complete diary solution showing daily, weekly and monthly views. In addition, onscreen reminders and notification alerts are available to all sales team members. This increases efficiency, punctuality and convenience for the sales team. It is also possible to run e-mail, calendars and contacts through Microsoft Outlook and all interactions can be automatically synchronised with Sage 200, meaning that contacts, tasks and appointments are automatically updated in both systems. This synchronisation of information fosters organisational transparency within the business and enhances the quality and retention of information available to you. The calendar can be managed from the interactive dashboard ensuring that appointments and tasks are managed with ease.

Sage 200 Suite Integration

The Sage 200 Suite provides tightly integrated front and back office data, and this sharing of vital financial and commercial information allows a true single view of the customer. This ensures that the sales executive is equipped with the most accurate and up-to-date information regardless of where that information is located. Operations are optimised as a result and there is less potential for delay, misunderstanding and error.

For example, sales staff can easily check the availability of stock at the point of order 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 sales staff to give accurate information to customers without delays, and thereby improving customer service and driving customer loyalty.

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- Over 25 year's experience.
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- 1/3 of the FTSE 100 use our software.
- A network of over 160 Sage 200 -certified partners specialising in business applications.
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- Sage is the 3rd largest ERP solution provider to businesses worldwide.
- Every postcode area has a business using Sage's mid market solution.
- 1000 independent and dedicated Developers who have already built thousands of applications for the Sage 200 Suite

For more information call **0845 111 99 88**
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