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APPLICATIONS AND SERVICES

Product Review

SAGE CRM WISE CHOICE AS MARKETING TASKMASTER

By Mario Morejon



While great CRM products create synergy between marketing, sales-force automation, customer care and the financial back-office folks, few can do it as well as Sage Software's (formerly Best Software) Sage CRM. Originally named Accpac CRM, Sage CRM now is sold as a stand-alone product, as well as a Web-based hosted solution at SageCRM.com.

SageCRM.com is priced at \$69 per user per month. The Sage CRM software is sold in two versions. For SMBs, Sage CRM is \$1,495 for the software and \$595 per named user.

Sage Software is now offering a special "rent-to-own" deal that provides 50 percent reimbursement of hosted fees to customers who buy the software in the first 12 months of service. Resellers of SageCRM.com will receive 100 percent margin on the value of the first year of any contract that converts Salesforce.com customers to SageCRM.com. After the first year, Sage Software partners can earn 10 percent to 35 percent margins on additional years of the contract. However, the company typically provides a 41 percent reseller margin for the software and 25 percent for SageCRM.com. To sell Sage CRM, partners must pass a certification exam.

Sage Software also has a sales and consulting academy that

SAGE CRM AND SAGECRM.COM

> **Tech Rating:**
★★★★★

> **Channel Rating:**
★★★★★

NOTE: RECOMMENDED STATUS IS EARNED WITH A SCORE OF AT LEAST EIGHT STARS OUT OF 10

provides advanced training to improve overall sales. Its Product Resource Center provides competitive pricing information, including best practices documentation. Technical support is available as a pay-per-minute offering.

Sage CRM is a mature CRM offering that treats accounts, companies and people with equal weight, so new people being added to the system need



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not be linked to companies or accounts. Other CRM products reviewed by the *CRN* Test Center typically use a hierarchical connection between accounts and people, so people cannot be added without being linked to accounts.

Despite this, users still can associate marketing information, notes and sales opportunities, including support case incidents, unique address and phone numbers, personal e-mails and a document library. This information can be accumulated at the individual level. The loose connection between people and accounts allows small companies to work directly with consumers. Physicians, for example, can use Sage CRM to track patient progress.

Pipelines used in the sales-force automation features are

based on filtered criteria, so users can select specific areas that are pending such as opportunities, proposals submitted and cases in progress. In addition to the pipeline, users can see statistical graphs that track weighted forecasts and average certainty. As soon as an opportunity is entered, users can apply a forecast scenario and add it to their quota, which then is shown in the pipeline.

Sage CRM's workflow is also simple to follow. By clicking on a Save and Submit button, for example, sales users can pass on opportunities or get agreements on sales or discounts to managers. New leads that come into Sage CRM and need to be submitted for proposals can be queued into a sales team or redirected into a salesperson. After leads fall into a salesperson's

task bin, Sage CRM creates a phone-call task that alerts the salesperson to call the leads within an hour and sends e-mails with qualification documents to the leads.

Sage CRM supports full bidirectional integration with Microsoft Outlook for tasks, appointments and contacts.

On the back end, Sage CRM can run SQL statements or stored procedures to validate any data within a workflow. Scripting business rules and conditions also is permitted against any field, as long as it works in ASP pages such as VBScript and JavaScript.

In addition to integrating with Accpac accounting solutions, Sage CRM has built-in rudimentary accounting features so companies can use the software independent of their accounting packages.