



# TURNING CUSTOMER LOYALTY INTO PROFIT

A Sage CRM White Paper



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# INTRODUCTION

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In April 2006, Sage Ireland carried out a survey of its CRM customers in Ireland.

The survey was unique in that it was the first to determine the difference that using a CRM system made to the respondents' business effectiveness, credibility and profitability. To date, previous surveys had concentrated on levels of awareness and interest in CRM penetration rates and the benefits that companies hoped to enjoy as a result. But this was the first to talk to people who had already taken the step to CRM, and experienced for themselves the measurable business performance advantages it promises to deliver.

“ CRM was so fundamental to their survival and success that taking it away would create chaos, panic and disorder. ”

Significantly, the results demonstrated an unprecedented enthusiasm for, and appreciation of the applications and benefits of CRM. In fact, to many respondents CRM wasn't just an important part of their business, it was so fundamental to their survival and success that taking it away would create chaos, panic and disorder. 'A giant leap backwards', 'a complete disaster', 'mayhem' and 'I'd be lynched' are graphic illustrations of the way that many of today's most dynamic and visionary companies have put CRM at the heart of their sales, marketing and customer service.

In other words, the companies who enjoy the biggest benefits from CRM are those who make it not an add-on activity or technology implemented and managed by default but a central part of their attitude, vision, culture, processes and practices. To those companies, CRM is not so much a technology as a methodology for good business, and implementing CRM software is simply a matter of putting a technological framework around a sales, customer and service-focused approach to doing business.

After all, as CRM is simply about giving the right information to the right person at the right time, at the right price, in the right way, this is a goal to which most well-run businesses already aspire. In fact, if you're a successful business, you must be doing it already.

For example, even if you don't have a CRM system, you probably capture customer data, analyse behaviour, target your marketing, make sure your sales team are alerted to a sudden influx of sales leads, make sure your service agents have customer data to hand and aim to solve service issues with the minimum of escalation. These are all good practices, with or without a CRM system and any CRM-centric business will follow them without question.

However, as the survey showed, CRM can still make a dramatic difference to a company's productivity, profitability and agility. This White Paper therefore aims to describe some of the best practices involved in making your business CRM-centric from the ground up, from improving operational efficiency in order to reduce costs and improve productivity to running more effective marketing campaigns.

You can use these best practices to benchmark your own CRM-centricity and to start planning your CRM strategy around your customers, your people and your processes, as well as your technology.

Next, we describe some of the ways you can harness the power of the latest CRM solutions to take your business to a whole new level of performance. As well as real-world scenarios by way of illustration, there are hints, tips and checklists to help you devise your own CRM strategy and define what you need to look for in a CRM solution.

We hope you find it inspiring, informative and most of all, useful. If you have any questions about the concepts and issues outlined in this paper, do feel free to contact us:

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# HOW EFFECTIVE IS CRM IN REALITY?

As CRM is defined as 'getting new customers and keeping the ones you have' according to its advocates, companies implement it in the hope of enjoying a wealth of benefits:

- Lower costs and greater operational efficiency
- Longer, more profitable customer relationships
- More effective marketing campaigns
- Better executive decision making
- A sharper competitive edge

These are fine promises for a CRM company to make and a testament to the passion that CRM inspires. However, with the Sage survey, these benefits have been quantified for the first time, with the result that a quarter of the respondents reported that they were 100% more effective as a result of their CRM system, with 44% agreeing that they were more than 50% effective overall.

In practice, this effectiveness manifests itself as a smarter, more efficient company, one in which production, logistics, sales, marketing and service teams operate as a cohesive and streamlined unit. While customers enjoy an attentive and knowledgeable service, prospects are targeted with relevant offers and all sales opportunities are followed up. Everybody is fully productive, nothing is missed, no effort or resources are wasted and decisions are made with the benefit of intelligence, not guesswork. Staff are respected, customers are appreciated and the company and its suppliers are profitable, stable, successful and secure.

“ A quarter of the respondents reported that they were 100% more effective as a result of their CRM system. ”

For example, the marketing team knows exactly which customers and prospects to target for a particular offer, the sales team has the hottest leads at its fingertips, ready to follow up, and the customer service team has detailed records of customers' preferences and purchase history to hand.

### THE TANGIBLE BENEFITS OF CRM

- More time spent by sales people with customers
- More new prospects targeted by sales people
- More time spent by sales managers in contact with customers and working on customer issues
- Greater customer service efficiency
- Increase in timeliness in following up correspondence with customers/prospects
- More revenue per month per sales person
- Better overall business results
- Greater frequency of your company name in front of your customers/prospects
- Greater customer satisfaction
- Improved communication within the company
- Higher close rates
- Shorter sales cycles

### THE INTANGIBLE BENEFITS OF CRM

- Overall smoother functioning within your company
- Increased employee motivation and satisfaction
- Better trained and more skilful sales people
- Improved use of remote or mobile access
- More up to date information and easy access to this information
- Improved responsiveness to customers and prospects
- Improved image of your company
- Ability to differentiate yourselves from your competitors
- Support for organisational change
- Improved understanding and eventual control over expenses



# AN ENVIRONMENT OF OPERATIONAL EFFICIENCY

With every management journal, magazine and online publication abuzz with the term 'operational efficiency', it's clear that the concept of being a leaner, smarter business has struck a chord with companies the world over. A two-fold process, it simply means reducing costs on one hand and increasing revenues on the other.

Of course, how this is achieved will depend on a company's business model, market, processes and competitive pressures, but as a basic common denominator, an operationally efficient business is a well-oiled machine, with a culture, process, strategy and methodology of continuous improvement. Unnecessary costs are kept to a minimum, productivity and the standard of service delivery are maintained at their highest level, whilst every opportunity to increase revenues, through better sales conversion, up-selling, cross-selling and customer lifetime retention, are enthusiastically seized.

“ 46% of Sage's respondents reported that they eliminated between 2 and 5 databases. ”

This never-ending drive towards lower costs on the one hand and higher revenues on the other, is a fundamental part of the way a CRM-centric business works. It's also one of the areas in which a CRM solution can deliver a measurable advantage.

According to the Sage survey, operational efficiency is one of the key benefits of using CRM. For example, almost 100% of respondents reported that their information is more organised, which is the basic platform for developing and expanding a business. As information, on everything from finance, logistics and production to sales, marketing and service, is the lifeblood of the vast majority of companies, organising that data to make it more accessible, measurable and above all, useful, can make a huge difference to a company's operational efficiency. In fact, 46% of Sage's respondents reported that they eliminated between 2 and 5 databases, which demonstrates how information is streamlined and centralised in a CRM-centric company.

As a result, they were able to achieve much greater operational efficiencies. For example, regarding the performance of the sales team alone:

- 72% stated that they had increased the number of sales calls per day
- 56% agreed that they had increased the number of sales visits to customers

# TARGETED MARKETING AND COMMUNICATIONS

In a CRM-centric business, targeting the right people, using accurate and up-to-date contact lists is standard practice in the marketing department. Random mailings, however clever and eye-catching, to any old list, with no follow-up and no managed fulfilment process are a complete waste of time and money.

Rather, in the CRM-centric business, marketing is a science as well as an art. Customers and prospects are analysed and profiled to identify the most appropriate targets for an offer or incentive. Every interaction is added to a customer's record to build a detailed picture of their purchase behaviour and personal preferences, which can be used for predictive, as well as reactive marketing. The sales team is alerted to imminent, incoming leads, while the service team is briefed on any potential issues that might arise. It's a perfectly balanced and optimised process to maximise response and conversion rates.

However, as part of the drive towards operational efficiency, improvements are always welcome and 84% of Sage's CRM users report that they are able to target specific customers more effectively. Thanks to CRM, research, marketing, sales and service can work together in a systematic, process-led approach to maximise response, conversion and ultimately, customer satisfaction, whilst reducing unnecessary costs and effort. Half of the respondents report that they are at least 50% more effective, which is a dramatic improvement, considering how much time and effort many companies put into their marketing.

As the survey respondents found, with a CRM solution, a company can take its marketing communications to a whole new level. Firstly, a CRM solution sits over a database, so the mailing or contact list can be compiled according to very specific criteria. This list can then be stored in a 'holding area', separate from the rest of the data to avoid any confusion or errors. For an online campaign, such as an email shot, many systems can actually compile and send an HTML email to the list and then record the responses and create a call list for the sales team to follow. For an offline campaign, such as a direct mail shot, data can be exported and provided to a fulfilment house and the record of this intention recorded in the normal fashion. The results can be reported at a micro-level, to provide the marketing department with vital intelligence to continuously improve return on investment.

# IMPROVED CROSS-SELLING

If you have ever been offered fries and a drink with your cheeseburger, or an upgrade to a larger portion for only a modest price increase, and thought nothing of it, you have been cross or up-sold by a very, very CRM-centric company. In fact, to a CRM-centric company, up-selling and cross-selling aren't additional to the sales process, they're a natural part of it. What's more, customers appreciate the opportunity to buy related items, or take advantage of a packaged or bundled offer at great value for money, which improves both conversion rates and retention. When it's done well, everybody benefits.

However, cross-selling and up-selling are only possible when customers are offered the right products or services, at the right time and at the right price, and this is where a CRM system makes a key difference. By providing a complete, accurate and up-to-date picture of each customer's preferences and transactions, opportunities can be identified that might otherwise go unnoticed.

In the Sage survey, 61% of companies agreed that their ability to cross sell products and services had improved as a result of their CRM system, with 44% of these seeing the level of improvement at more than 50%. Considering how much easier and cheaper it is to sell more or higher value products or services to existing customers rather than to keep winning new ones, it's clear that cross-selling and up-selling through a CRM system can significantly increase customer lifetime values.



# FROM INFORMATION TO ORGANISATION

In a CRM-centric company, information flows smoothly between one department and another to provide a 360 degree view of all customer information and interactions to the sales, marketing, service and management teams. Everyone has the accurate, up to date information they need, when they want it and the problem of information being held by individuals and not shared with the rest of the organisation, can be eliminated.

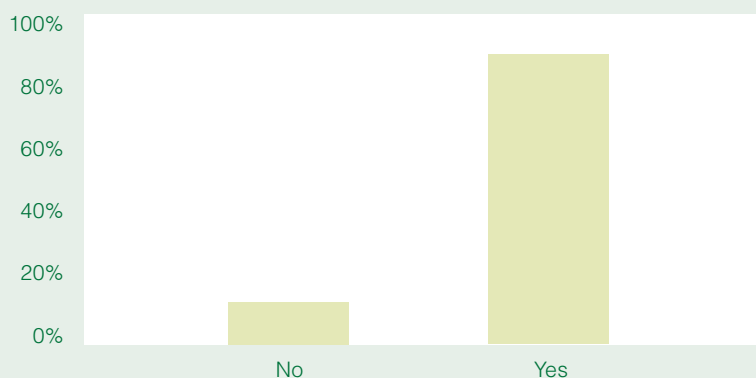
“ 93% said that information flowed better, the benefits of which can be felt in a variety of ways.

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For example, the customer service team will be alerted to forthcoming 'events', such as the expiration of a free offer period, which represents an upgrade opportunity. The marketing department will know how successful previous campaigns were, which enables future campaigns to be developed with the benefit of hindsight. Likewise, in the sales department, managers can view the activity of the entire group whilst being able to monitor the performance of teams and individuals. Sales people themselves, rather than having their own personal databases, can see their colleagues' activities, including any recent service queries, complaints or credit issues.

In short, the company can work as a co-ordinated and cohesive unit, resulting in less wasted effort, better service and happier customers.

**When a staff member leaves, is the organisation's ability to continue with an uninterrupted workflow much better as a result of implementing a CRM system?**



# CONTINUED

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This information flow improves significantly when a CRM system is deployed. 93% of respondents to the Sage survey said that information flowed better, the benefits of which can be felt in a variety of ways.

For example, when a staff member leaves, 90% of respondents said that workflow wasn't interrupted in the way it would have been if the information left the company at the same time as the employee. Whilst it might take weeks to sort through the information that an ex-employee may have been keeping to themselves, such as conversations or contacts with customers, organisations can keep on working with minimal disruptions. New employees too can be brought up to speed within a few hours, with access to a central 'corporate memory', to be more productive, faster and give customers the seamless, high quality service they expect.

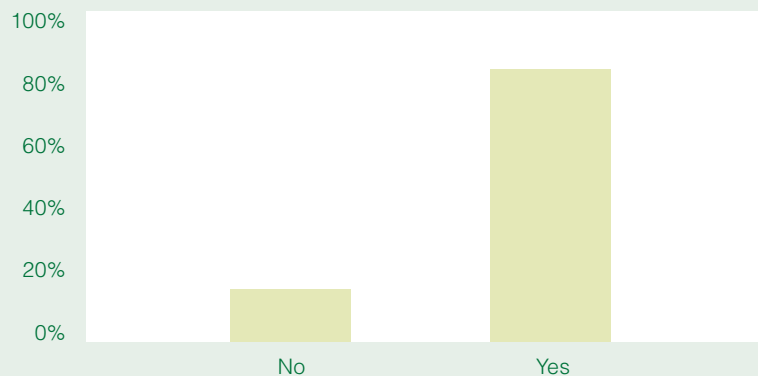
# GREATER CREDIBILITY

In a CRM-centric company, the relationship between a company and its customers is one built on trust, understanding and familiarity. All customers enjoy a high standard of care, attention and support whichever channels they use, whether the web site, the call centre or the shop floor. They never have to give information, such as contact details, more than once. Whoever they speak to, whether a salesperson or a service agent, will always have accurate records and know what they are talking about. They only receive relevant, timely, personalised marketing offers and incentives and are well looked after as part of any marketing activity.

In the customer's eyes, a CRM-centric company enjoys tremendous credibility, which leads to longer, more profitable relationships, referrals and recommendations. With improved customer retention and lifetime values, customer acquisition costs, as a result, are significantly lower, which further improves profitability in a self-liquidating cycle of continuous improvement.

Nonetheless, with a CRM system, the extra credibility it helps a company to convey can further improve customer relationships. According to the Sage survey, 84% said they were more credible when talking to customers. By enjoying a 360 degree view of all customer data, drawn from a single, integrated database (46% of survey respondents have eliminated between 2 and 5 databases) all customer-facing staff can have the accurate and up-to-date information they need instantly to hand.

**Has your organisation gained more credibility when talking to customers as a result of implementing a CRM system?**



# INCREASED REVENUES



In the drive towards operational efficiency that characterises a CRM-centric business, maximising the lifetime value of customers is a fundamental element of good business management.

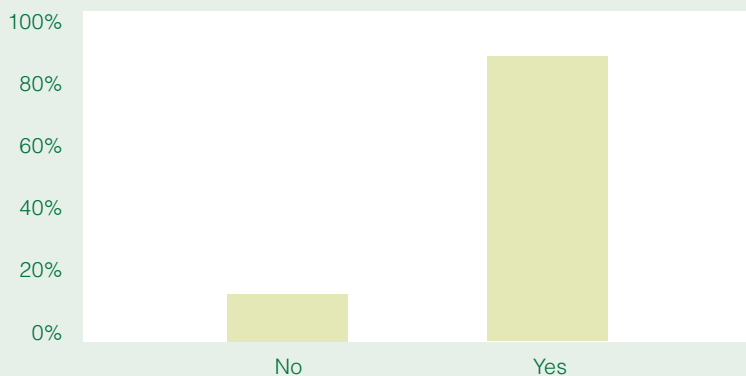
With targeted marketing and follow-up, sales conversion rates are increased. With access to customer purchase histories, sales people can ensure no opportunities are missed for up-selling and cross-selling. With high quality customer service, customer satisfaction is improved, for better retention and therefore, revenue. Likewise, when marketing, sales and service staff are focused on customers and not on struggling with their information, productivity improves too.

In short, a CRM-centric company has the culture as well as the processes in place to achieve the dual challenge of CRM: to win new customers and keep existing ones for longer.

One of the key findings of the Sage survey was that CRM users enjoyed significant improvements in both customer acquisition and customer retention. For example, 74% stated that the quality of their sales calls had improved. Likewise, 88% reported they had increased the number of opportunities they were able to follow up.

There is often a perception that CRM only delivers intangible benefits, such as 'happier' customers but these figures demonstrate the measurable improvements that it can make to a company's sales performance and ultimately, its revenue.

**Has your organisation increased the number of opportunities it follows up as a result of implementing a CRM system?**



# LESS WASTED EFFORT

In a non CRM-centric company, everything has to be done at least twice. The service team often calls the same customer about the same issue, several days in a row. Customers have to give their contact details to everyone they speak to. The marketing department often sends the same mailing to the same target without realising. Customers are doubly upset and frustrated.

However, in a CRM-centric company, no effort is ever wasted. Marketing is highly effective, sales are streamlined, and service calls are dealt with promptly and efficiently. Nobody needs to waste time searching for information, input the same data twice and deal with the resulting errors and oversights, or solve a customer issue that has already been addressed. Staff are more productive and happier for it. A CRM-centric company in other words, is smarter, faster and focused on what counts: winning new customers and keeping existing ones for longer.

“ 83% agreed there were fewer manual processes since implementing the CRM system. ”

With a CRM solution in place, this 'lean' approach to sales, marketing and service can deliver even greater improvements. In the Sage survey, for example, 83% agreed there were fewer manual processes since implementing the CRM system.

For example, with a CRM system, a customer's transaction and communications history are pooled into an integrated and accessible resource. Sales, marketing and service staff, wherever they are based, can see at a glance everything from purchase and call histories to emails and documents sent and received. Armed with this knowledge they can handle customer queries more efficiently, which in turn enhances and strengthens the customer experience.

Another way in which a CRM solution can help to eliminate waste is in the repetitive task of business reporting. Assuming the basic information is being entered regularly, reporting is a simple process. Data need only be entered once, pre-configured queries can be run as often as required and reports are real time, comprehensive and dynamic.

# CUSTOMER SATISFACTION

A CRM-centric company will be easy to do business with. Customers enjoy excellent service from people who know all about them and receive only personalised, appropriate communications from a company that has clearly done its homework. In fact, they get the right information, at the right time, at the right price, in the right way.

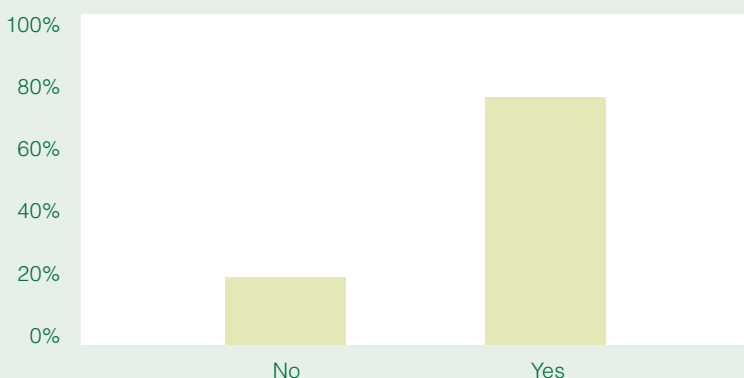
That's because a CRM-centric company asks itself 'what are we like to do business with? Are we responsive and proactive? Do we provide a tailored service, ask the right questions and know what we're talking about? A CRM-centric company has seen the research that shows that only 20% of customers will rave about a company's products or the price, with the remaining 80% choosing, or staying with, a company for its service.

Customer satisfaction, in essence, is directly correlated to customer service. While a company that doesn't look after its customers is at risk of losing them to the competition, a CRM-centric company gives its customers every incentive to stay loyal.

As the respondents to the Sage survey reported, implementing a CRM system can further improve customer satisfaction. 79% reported they had increased their levels of customer satisfaction as a result of the CRM system, with 30% of those estimating that the level of satisfaction had increased by more than 50%.

The reason is that CRM helps to make a company a more professional organisation with which to do business. Information is to hand when customers call. Offers are relevant rather than irritatingly random. Contact is regular and appropriate. Quotes and invoices are accurate and timely. In short, a CRM system allows a company to gather, retain and understand customer data, which therefore improves customer satisfaction and, as a direct result, retention and revenue.

**Do you believe that your organisation has managed to increase levels of Customer Satisfaction as a result of implementing a CRM system?**



# RETURN ON INVESTMENT

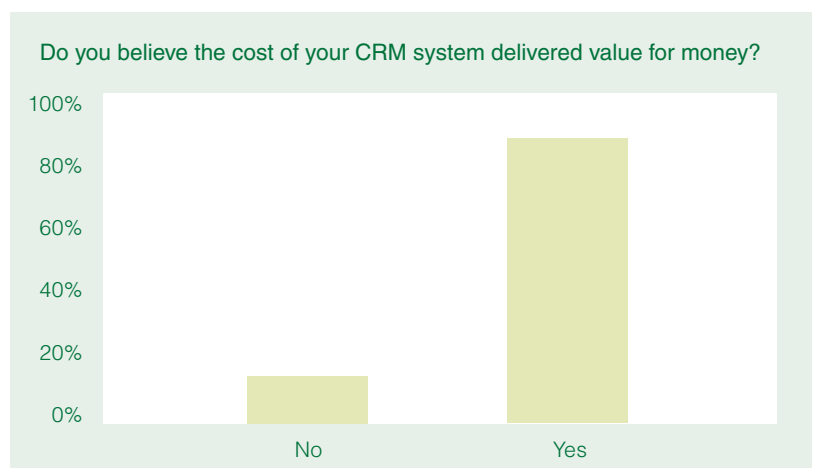
In today's operationally efficient business environment, return on investment is, as you might expect, the only metric by which the success of a customer relationship management initiative is measured. From direct mail campaigns to sales initiatives, getting a measurable return in exchange for spend is simply standard practice for a CRM-centric company.

Of course, the potential ROI of CRM has been well documented. According to a study by the ISM/Insight Technology Group, for example, implementing a CRM system should lead to an increase of 10% in gross sales, with a corresponding 5% decrease in the cost of sales. Forecasted sales are expected to increase by 5%, while customers' quality ratings are predicted to increase by 5%.

“ 86% stated that if faced with the decision to purchase a CRM system again, they would make the same decision. ”

However, the Sage survey was the first to record the return on investment on actual, rather than potential CRM implementations and the results are significant, with 88% reporting that it was value for money. What's more, 86% stated that if faced with the decision to purchase a CRM system again, they would make the same decision.

Bearing in mind that quality CRM is not cheap and will always be a considered purchase even in the most CRM-centric organisation, these figures validate the commitment that these companies made to their CRM solutions. It's clear that the promised results of better sales, lower costs and longer, more profitable customer relationships are being achieved in the real world. These are the same companies who value their CRM system so much they predict disaster if it were to be taken away.



# FROM CRM-CENTRIC TO CRM SOLUTION

As the processes and principles of CRM are essentially common sense good business practice, turning a CRM-centric culture and methodology into a CRM-ready company is simply a matter of procedure. For example, developing a customer-focused marketing, sales and service strategy and methodology, and knowing what needs to change, will create the initial platform for deployment. A cultural change, such as a willingness to share information within the organisation and a change in staff work practices, is essential.

It is also important to note that a CRM implementation needn't cover the entire marketing, sales and service functions. Often, the most successful projects tackle one function at a time, expanding into new areas of the business as the usage, acceptance and benefits of the system naturally evolve.

## WHAT HAPPENS NEXT?

### Step One - Set up a project management team

You'll need a Project Champion, such as a Senior Manager, a technically-focused Project Leader and a Project User Group, to help define and develop the solution from the user's perspective.

### Step Two - Determine the functions to automate

The clearer you can make this, the faster, more cost effective and successful the implementation will be. Remember, you need to think about business functions, rather than features.

### Step Three - The Business Case

Firstly, review the outcome of the audit in Business Terms: How does this support our Business Strategy? What measurable impacts will it have? What improvements can we expect? Where will it reduce costs?

### Step Four – Use technology smartly

When you're choosing your software vendor, technology is less important than experience. Experience, skills and domain knowledge in implementing CRM solutions are critical to their successful deployment in any business.

**Step Five - Secure user ownership**

It's imperative that users buy into the implementation, as they need to see they are getting more out of it than they are putting in. Staff need to feel motivated to use it, rather than threatened by it, particularly if they are worried about extra surveillance or possible job losses as a result.

**Step Six - Prototype the system**

Implement in phases – go for the function, such as sales, marketing or customer service, where it's needed most, first. It's always better to be late rather than wrong, so don't be afraid to start with a single-function deployment and expand it into the rest of the business.

**Step Seven – Train and motivate staff**

User buy-in is essential, as is user feedback. After initial training, follow-up training and feedback sessions are an effective way of ensuring that the system meets the needs of individuals, as well as the business as a whole. It's particularly important that management stay committed to the project, as high-level support is critical to its continued success.

**Step Eight – Keep it running**

Lastly, administration of the system needs to be considered. As with any deployment of this kind, a combination of simple housekeeping and strategic and technical resources will be required. Who will do it? Do the skills exist in-house and what are the time and cost implications of the various outsourcing or recruitment options.



# SAGE AND CRM

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Sage Ireland is a leading provider of CRM solutions and offers a diverse range of CRM products and services that can be tailored to suit individuals and organisations with simple or highly complex business requirements.

Experience, skills and domain knowledge in implementing CRM solutions are critical to their successful deployment in any business. Sage's experience in CRM as well as its product choice is unequalled in Ireland. Its portfolio of services ensures that you can determine your customers' needs, and that the key steps, Sage's proven methodology to successfully implementing a CRM system are followed, whilst its products can be configured to automate almost any customer-facing business process.

Sage Ireland has made significant investments in its dedicated CRM team in Ireland to allow businesses to unlock the potential of their customer information. Sage employs 240 people in its two offices in Dublin and one office in Cork and continues to invest and deliver on the needs of Irish business.

Sage Ireland has over 15 experienced CRM Business Partners, and boasts over 2000 successful CRM implementations across all business sectors and sizes including Canon, KPMG, VHI, BUPA, Royal Liver, Enterprise Ireland and BMW.

## **SAGE'S CRM SOLUTIONS:**

Some vendors insist that a CRM solution has to be accessed through the internet to be effective. Others argue that it has to be implemented on-site for the best results. But, in fact, the only essential criterion for any CRM implementation is that it has to be **right for your business**. That's the Sage philosophy. It's a philosophy that puts your best interest first. It's a philosophy of choice. Sage's CRM Solutions comprise:

### **Sage CRM**

Sage CRM for small and mid – sized businesses that are looking to track and manage customer relationship information, is an award-winning wireless and Internet-based CRM system that provide sales, marketing and customer care automation, as well as business-wide access to vital customer, partner and prospect information — anytime, anywhere. Sage CRM is installed on-premises for total control and a low cost of ownership.

**Sage CRM.com**

Sage CRM.com is the hosted version of the Sage CRM solution.

An on-demand, subscription-based solution, SageCRM.com is maintained offsite, delivered over the Internet, and accessed securely via any Web browser. You get deep sales, service, and marketing functionality without having to make any upfront investments in hardware or software. Plus, there are no maintenance, support, and upgrade costs—one flat monthly fee includes everything you need.

Sage CRM.com delivers rapid results because there is no software to install, no hardware to buy, no maintenance, upgrade or software costs.

**Sage CRM SalesLogix**

Sage CRM SalesLogix is the leading customer relationship management solution that enables businesses to acquire, retain and develop profitable customer relationships. Sage CRM SalesLogix delivers integrated and robust Sales, Marketing, Customer Service and Support automation solutions with advanced customisation capabilities.

**ACT!**

An easy-to-deploy contact and customer management solution that's easy to learn and available in Professional, Groups and Web versions. ACT! ensures your customer-facing employees can focus on what they do best – sales and service.

**GoldMine®**

Get a complete view of your customers and prospects. GoldMine® software helps you win and retain customers by putting valuable contact information at your fingertips, and automating a number of routine activities - without sacrificing your bottom line.

**HEAT®**

Reduce costs and elevate service levels with HEAT® Service & Support, the foundation of the HEAT® product suite. Proven and powerful, HEAT® Service & Support is the service desk software that helps organisations of all types take their service and customer satisfaction to the next level.

# CUSTOMER TESTIMONIALS

## SAGE CRM

There were a number of reasons for selecting Sage CRM MME (Sage CRM). It was a fully web-based solution which was critical for a global implementation and it could support the forecasting functionality that our business model required. Sage CRM was also compatible with web services, thereby ensuring successful integration with our financial system, any of our existing databases and any other potential systems. Another benefit of the CRM implementation is IONA's unified customer view. With Sage CRM we have achieved our company objectives of delivering a full cycle customer view of the entire organisation worldwide.

Cormac Ó Foghlú, Worldwide Infrastructure Manager, IONA

## SAGE CRM SALESLOGIX

The most useful aspect of the software is the synchronisation. This allows all the history activity for its client database, for example documents and emails, to be shared between all users quickly and easily. The package also utilises a SQL database, which can be increased drastically in size without losing or corrupting data.

The functionality is excellent. It is the best package we could find for our business in ESS.

Patrick Greene, Business Development & Technical Manager, ESS Ltd

I estimate that my factory showcentres will be able to increase their business volume by well over 50% without having to employ any extra customer service staff.

Richard McMullan, Managing Director, Sliderobes

## ACT!

ACT! has helped us to automate our administrative processes, thereby the staff at SOS can focus on what they do best: selling, training, and maintaining quality customer relationships. Increased efficiencies, faster response times, and higher service levels will enable us to efficiently handle the dynamic future growth that we have forecasted.

John Bloomer, Sales Commercial Director, SOS School of Sales



**TURNING CUSTOMER LOYALTY INTO PROFIT** A SAGE CRM WHITE PAPER