



Sage CRM – Marketing Automation

Sage CRM provides a single source of customer information to help you better manage your marketing efforts and make sound decisions based on the needs of your customers and prospects.

With Sage CRM Marketing, you can target the right customer at the right time, eliminate guesswork, and put your company's marketing resources to their best use. You can schedule and track marketing activities within a campaign— and view every detail of each campaign.

Campaign Management

- View responses to each campaign, replicate effective initiatives and assign return on investment to each campaign
- Integrate completely with marketing functions to allow instant feedback and information from a campaign to a sales person
- Assign, schedule and track marketing activities within a campaign and view every detail of each campaign at a glance
- Drill down to specific activities within a campaign including communications, opportunities, responses, budget, actual cost and lists of prospects
- Segment your audience (based on product interest, demographics etc)
- Retain successful data for future campaigns

Segmentation & Groups

- Segment customer and prospect lists using user-friendly tools
- Deliver targeted messages to select groups or target audience
- Export marketing lists to Microsoft Excel for external agencies

Outbound Call Management

- Easily integrate telemarketing into any marketing campaign
- Allocate and schedule target lists and calls
- Schedule follow-up calls at times convenient for prospects and customers



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- Save details of calls and share this throughout the company

Email Management

- Make it easy to distribute mass email by providing the ability to send HTML email, create email templates and send attachments
- Store all communications about a particular campaign, so that employees can easily look up the exact email message received by a specific customer or prospect

Campaign Reporting

- Get real time information about the success of individual and ongoing campaigns by tracking them from initial lead generation right through to close
- Match sales revenues to specific campaigns, providing immediate cost vs. sales analysis data
- Analyse marketing campaigns by lead source using user-friendly tools and reports

Lead Management

- Qualify leads into your chosen criteria for follow-up
- Prioritise leads ensuring no lead gets lost or goes cold
- View the lead at every stage using powerful lead-tracking functionality

List Management

- Create target lists from selected criteria, re-use successful campaign lists or import mail house lists
- Merge documents with target lists for mass mail-outs
- Create interactions and record marketing pieces sent for future reference

* Unavailable or limited when using the software in an on-demand model.