The

CRM CONNECT

Dedicated to success with Sage CRM magazine

CRM NEVER FORGETS

Brought to you by CRM Together

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From the Editor

Majella O'Connor
Editor

Thank you for taking the time to read our magazine, really hope the content around Sage CRM proves informative, inspiring and of course interesting.

The idea for this publication came about because of the thriving Sage CRM Community we are lucky to be a part of, we asked our partners would they like to submit an article and were genuinely taken aback at not only the volume of content but the quality too. Articles include advice, observations, case studies and a customers story embarking with Sage CRM.

Our cover image, sourced from Unsplash, was chosen because "an elephant never forgets". That's probably not true all of the time, however, with CRM it is a fact! That is precisely why every successful organisation needs Sage CRM to scale up their business.

As Basil Malik put it in his article: "*There are no band-aids or quick fixes to undo years of complacency or the 'that's just how we've always done it…' attitude*".

Arline Welty pulls no punches in highlighting *"…when we know how many opportunities, we need in the pipeline in order to win one, it's simple to see whether we've got a sufficient number or not"*.

I would like to thank our Sage Partners and contributors Arline (DataQuest), Dan (My CRM Manager), Don (Effective Solutions) Basil (Blytheco), Peter (Azamba) and Caroline (Avrion) for their articles packed with tips on how CRM can streamline your business. To Marc (CRM Together) for sharing a day in his life with us. Jared (BrandT) for taking the time to chat with us and outline their CRM journey, culminating with the implementation of Sage CRM as the ideal solution for their business. Ralph (Timespare), for an idea of how simple a CRM implementation from scratch can be for an SMB.

One of the greatest executive challenges of our time is how to achieve the elusive work/life balance, as Bruce Lee put it ' Make deliberate choices about the lives we want to lead' so we have included some articles from Alexsandra and Sharon with their advice on how to manage our physical and mental well-being, thank you to both of them for taking the time to contribute to the publication.

I have to say, I really enjoyed the little bit of editing I had to do, and of course, working with Dave of Hidden Depth in terms of layout and design. It is easy for us living and breathing the Sage world to grasp how powerful CRM is in everyday business, but to hear it in the voices of the Sage Partners allows us to present the concept in a way that might resonate with a decision-maker and help them realise the missing piece of the puzzle to scale their own business.

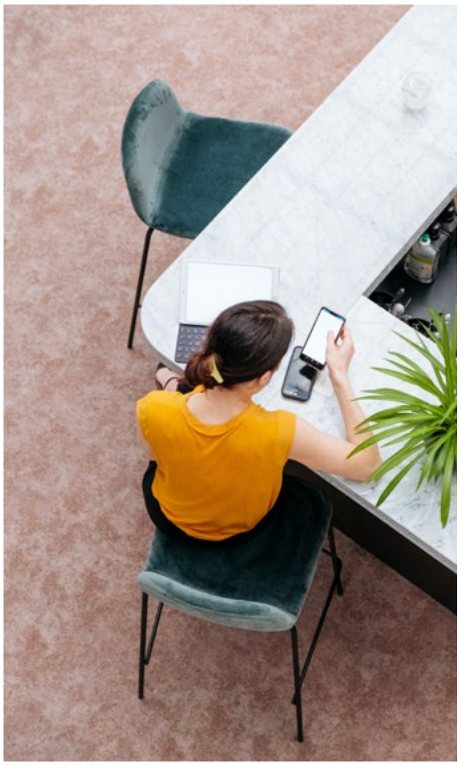
If you are interested in submitting an article for another issue, please do drop me an email at majella@crmtogether.com

For additional information on Contributors and more info links on products scan the QR code below

For now, happy reading!

Majella

by Arline Welty
Principal, DataQuest



Less email, more CRM

Sofware used:
Sage CRM

If you complain that you're "drowning in email", you might, regrettably, be suffering from email dependency. When you let your Inbox decide what you're doing that day, you're not building anything. You're just reacting – you're volleying to get the ball back to the other side of the net. It's not strategic, it's reactive.

Unlike money, time is our non-renewable resource. To honour that sombre thought, we've got to be more strategic about the way we spend the day. I posit that, to feel satisfied at the end of the day, you need to have some intention around how it *should* be spent.

This is where I believe CRM comes in. **Using CRM is a method to embed organizational goals into everyday activities**. For example, successful organizations review their strategic plan and construct CRM goals around that plan. One suggestion is to connect annual organizational sales goals with Opportunity tracking in CRM.

When we know how many opportunities, we need in the pipeline in order to win one, it's simple to see whether we've got a sufficient number or not. Using CRM as the 'to-do' list makes organizational work concrete.

In this example, the organization transitions from using the Inbox as a to-do list, to using CRM's opportunity list as the to-do list.

Unfortunately, sometimes email dependency is part of the organizational culture.

Here's where there are even larger gains to transitioning to CRM.

- Company-wide communication runs more smoothly.
- Instead of sending emails to find out when we last spoke with a lead, just check CRM.
- When we've all got a central place to rely on, we're all up to date.
- It's wise to base team reporting on what's logged in CRM. If the data's not there, it's not counted toward the sales goals and is not honored as valid. Yes, this takes a certain ruthlessness. But it encourages people to look less at email and more at organizational goals on a daily basis.

To summarise, **when people are looking at an opportunity list in CRM first thing in the morning instead of opening Outlook, we're heading in the right direction.**

by Caroline Robertson
Project & Planning Manager, Avrion

Benefits of Sage CRM Workflow Escalation Rules

Sofware used:
Sage CRM

Investing in software for your business should help you reap numerous benefits, including increased efficiency and productivity along with reduced costs. But are you truly making the most of your software and systems?

We are in the digitisation age, where organisations are seeking out ways to make their processes more efficient and reduce human errors.

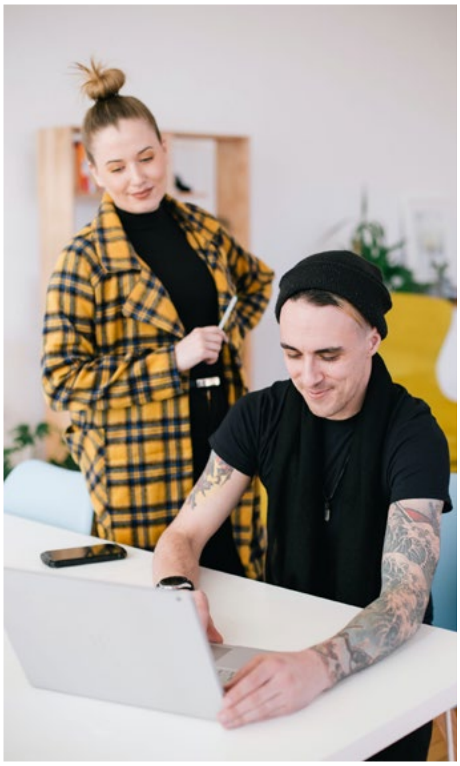
Digitisation benefits include:

- Reducing time spent by users who would have to send out emails to notify or chase customers
- Reduce time spent by management tracking and chasing users
- Helping everyone to keep on top of Tasks / Projects / Sales Opportunities / Customer Service Cases
- Improving customer communications and response times
- Ensuring the correct information is being entered into Sage CRM and business processes are being followed

Common Sage CRM Escalations/Workflows

- Using workflows for managing different stages of an opportunity. The available workflow buttons are set in a way that guides users through a life cycle of a sales opportunity (or project) that reflects the customer's business processes.
- Setting Workflow functions to be available, only if specific criteria is met, against cases/opportunities etc. to ensure the correct methods and processes are being followed.
- Case and Opportunity Escalation/assignment to handle transition of responsibility and accountability of sales and service cases.
- Automatic Case overdue emails, which alert users assigned to cases/management that an SLA has been exceeded and needs attention.
- Automatic project management emails to alert users that milestone dates are due/overdue.
- Automatic sales emails that are triggered by an Opportunity being won, with welcome packs/brochures attached.
- Automatic thank you payment emails that go out when a payment/transaction has been entered into the back office system.
- Automatic Task creation for users to follow up on at the end of sales, projects etc.
- Automatic Emails to customers that let them know their project has progressed (triggered from stages/milestone fields).

by Basil Malik
CRM Practice Leader, Blytheco



Leveraging CRM to Win and Increase Operational Effectiveness

Sofware used:
Sage CRM

Customer Relationship Management (CRM) isn't new to the wonderful world of business. Unlike Disney World, CRM isn't the happiest place on Earth. It's a known destination that can be as equally frustrating as it can be rewarding. So why the disparity?

How can some businesses tout that CRM is the "lifeline" or "backbone" of how they do business while others struggle to get user adoption? How can an organization arrive at a place of nirvana where they're seeing things like:

- Between $5.60 and $8.71 ROI for each $1 spent on CRM
- Sales revenue increases of up to 29%
- Up to 41% increase in revenue sales for each salesperson
- Increased customer retention rates of up to 27%

The simplest answer is that those numbers all come from businesses that place CRM at the heart of their business's operations.

CRM as an Operations Tool

To truly be called a "CRM" system, it must – at the very least – encompass sales, marketing, and customer service operations. That definition creates a misnomer. While CRM can touch those areas, not every organization has a need to do so. Pain points and pain factors vary from business to business and industry to industry.

Operations, or how a business engages its employees to follow business processes, is where CRM opens doors to endless value.

Yes, technically sales, marketing, and customer service has its own processes; however, breaking apart the various processes within each functional department becomes paramount.

Process Analysis and Workflow

When business processes are brought into a CRM, insight is gained.

- Which users follow processes consistently?
- Where do operational bottlenecks occur within each process or subset of processes?
- What opportunities exist to either implement better workflows versus allocating more resources to specific areas that create or cause process inefficiencies?

Implementing processes within a CRM provides the insight necessary to analyze and act. If users want to use the system, it speaks to the software's validity. If they don't, it tells an equally important story that the system's architecture does not provide the needed value for users to adopt it.

Leveraging CRM to Win

- Identify an area of business that struggles with reporting, performance, visibility, or business tools.
- Hyper focus on this segment of the business.
- Break each process within this area down to its granular steps, and rigidly identify where each step connects or potentially overlays another process.

Continue to do this until there is a clear "**Start**" and "**End**" point, and every "**if, then, else**" scenario is covered as best as possible.

- Which steps require data input or manual involvement?
- Which steps could be automated based on specific conditions from one step to another?
- Which steps, if automated, threaten diluting the culture of the company?
- Which steps instill a perception of excellence with its end users?

From that exercise, there now exists a diagram of processes for that segment of the business. Additionally, there are known steps that can be automated or streamlined to eliminate operational waste without risking the business's brand, reputation, or culture.

Taking Action

Using the diagram created, it makes the task of selecting a CRM solution that provides the price point and features needed to recreate the processes within the CRM platform easier.

For readers of this magazine, **Sage CRM offers a low per user, per month cost** while delivering the necessary features required to continue with the exercise. There are others, but each organization should do its due diligence and research to ensure the correct CRM gets selected.

Leveraging the process flows within the chosen CRM,

- Digitize each business process,
- Roll it out to a user group for proper User Acceptance Testing,
- Make changes based on feedback,
- Deploy to the entire business unit.

That's not the end of the road. This shiny new process and CRM solution must continue its evolution to achieve maximal results. Continue collecting feedback over time from users, and implement changes to the process where it yields additional efficiency.

A governance committee, or a group of users creates a proper panel that will maintain a vested interest in the CRM's success.

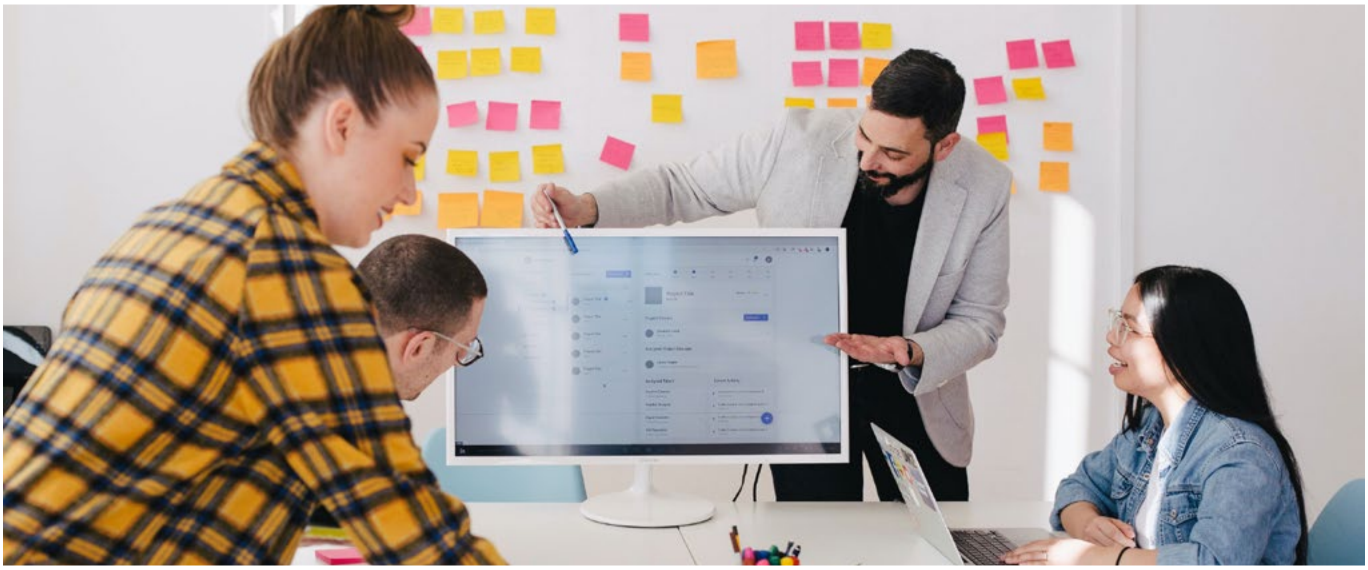
Once one area of the organization has been conquered, the CRM solution can expand its scope to the next business unit.

The Journey

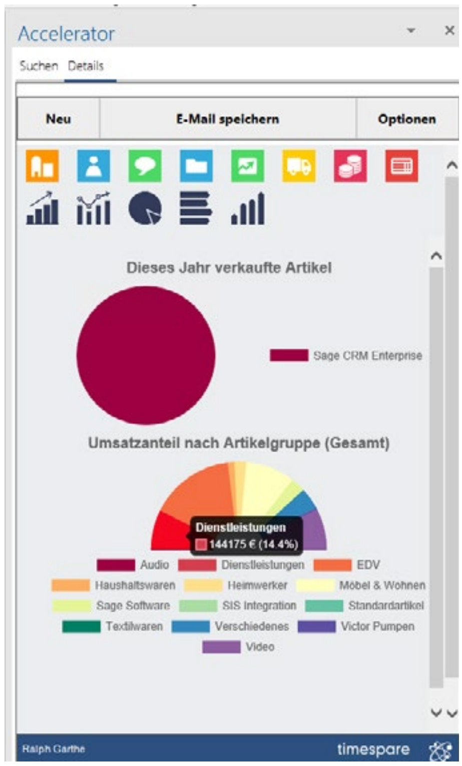
CRM systems rarely succeed in triumphant fashion. The companies that truly embrace CRM and achieve the values outlined earlier in this article are the ones that **exercise patience and consistency**. Trial and error, wireframes, testing, reassessing, tweaking, undoing, redoing, and repeating several of the steps in this article is the only sure-fire way to ensure a CRM unlocks the full potential of an organization.

There are no band-aids or quick fixes to undo years of complacency or the "that's just how we've always done it" mentality. It will take time, patience, and perseverance to arrive at an outcome that yields the most value.

Each organization will experience its own unique journey relating to CRM. **Commit to the journey**, and the benefits touted by the organizations that swear by its CRM can be obtained in time.



by Ralph Garthe
CEO , Timespare it-solutions GmbH & Co. KG



Getting started with Sage CRM in 5 days sounds unbelievable

Sofware used:
Sage CRM, Accelerator for Sage CRM

How is that supposed to work ?

I will try to explain how this is possible and how to achieve success with CRM based on my experience in the real world.

Everyone needs CRM, this sentence is known to everyone. Companies, users, manufacturers, and sellers. But when we ask why has everyone not got CRM or ask what their experiences with CRM, the feedback is often very sobering.

Either the expected benefit is not in proportion to the investment, or often the concrete benefit for the customer is not even recognisable. The expected start-up takes too long and is not completed.

CRM customers report that they now have an additional “workload” due to an additional tool that is not or only poorly integrated with the existing solutions, technical problems in the simplest requirements (e.g., filing e-mails) and the associated low user acceptance. And then new CRM customers also discover that the quality of the existing data (typically ERP data/only companies, no contact persons, etc.) is not usable for CRM. Original visions for CRM use such as marketing campaigns, sales and service thus become a distant prospect.

But actually, it’s not really difficult. - If we understand our customers’ business and offer a solution at eye level, everything suddenly looks a bit different and easier.

Let’s assume that our potential customers already use ERP in their company. This is certainly the case with almost all of our customers. This means there is already a very important solution to consider and there is already data and processes that a CRM has to deal with.

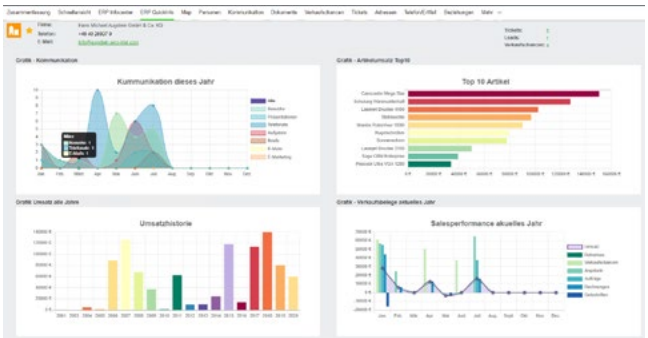
Furthermore, in every company a significant part of the workload is spent on processing e-mails, which is the usual way of communication today, both internally and externally.

This is not really a new insight, but these are two elementary issues whose successful solution generates disproportionate effects and is the basis for all further measures.

And every client assumes that this is exactly what works smoothly. In reality, however, it unfortunately doesn’t always work out like that at all. - As mentioned briefly above, this is exactly what fails due to either disproportionate implementation costs in adaptations and integrations and/or a non-existent success strategy.

Remember, we are dealing with Sage customers here, these are usually small and medium sized companies, not large corporations with their own CRM project group and a big budget. But almost always with Sage ERP. - And this circumstance is now exactly a big advantage!

Then let us deliver exactly what a Sage customer expects in his “dreams” and makes them happy. At the a reasonable budget, in record time and with a guarantee of success.



We call it CRM in 5 days....

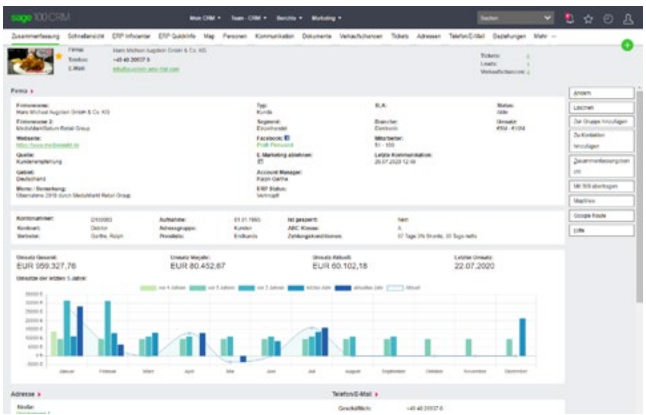
Out of the box, Sage customers receive an unprecedented deep and comprehensive bidirectional integration with their Sage ERP system. Right from the start, the integration includes the necessary process logic for continuous business processes, synchronises master and transaction data and provides extensive real time data views of the required ERP data. –

Right from the start, all CRM screens and functions are optimised for use with ERP data. A multitude of ready-made CRM reports, evaluations and groups with typical ERP data are supplied immediately.

We deliver a ready-made high-performance Outlook integration (Accelerator from CRM Together) with optimized screens and functions, including ERP data to get started immediately.

The “trick” is, we don’t waste time with discussions about elaborate individual adjustments or ideas that are not feasible at this point. Together with the client, we focus on maximum short-term success. We deliver a ready-made Sage package.

Nevertheless, we take into account the individual possibilities and already plan the next steps. We actively accompany the customer on his way to achieving all the basics and then scale the development.



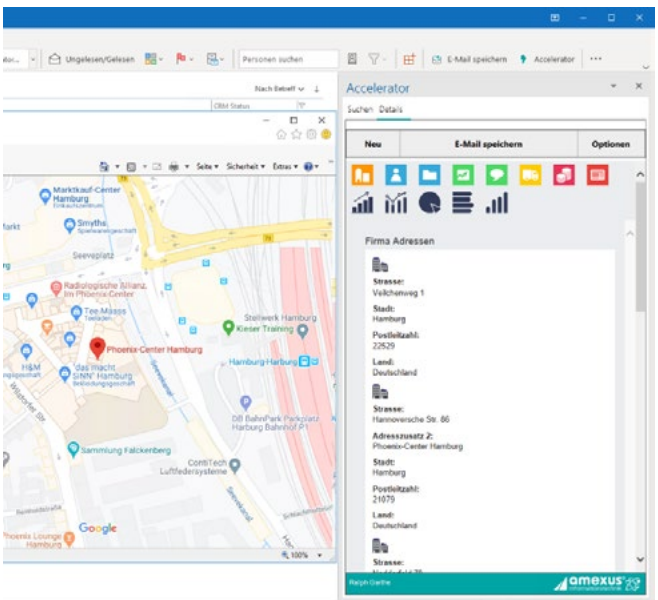
What is achieved with the client?

1. Integration of communication into the business process
2. Significant improvement of data quality on the fly
3. Extremely efficient and comprehensive contact management
4. Mobility, Microsoft 365 Integrations and location-independent working
5. More customer satisfaction

What experience have we had with this approach ?

We launched this package as a “product/method” at the beginning of 2020 and brought it to market together with some Sage business partners in Germany (Sage Line 100 is the ERP system name). The first surprise was that an unusually large number of Sage and other ERP customers were interested in these solutions. The second positive realisation was that this story can also be communicated very well by non-CRM salespeople and we were able to achieve great sales success.

The sales effort has also been reduced considerably, an average demo now only takes about 1/2 to 1 hour. And the project risk is extremely low for all involved. It is also very interesting that we were able to get quite a number of already existing Sage CRM customers back on the “right track” with this approach. - We are convinced that this is exactly the right solution or the right approach for Sage CRM Partners (and customers).



What do we achieve with “CRM in 5 days”?

1. A clear common goal
2. A reasonable budget and a very short implementation
3. Big impacts in efficiency, teamwork and productivity
4. An exceptionally positive user experience
5. All the necessary basics for an extended CRM use, such as marketing, service and sales

Integrations

- SCRM — Sage CRM
- S50UK — Sage 50 UK
- S50NA — Sage 50 NA
- S100 — Sage 100
- S200 — Sage 200 UK
- S300 — Sage 300

Effective Solutions

S5 Maps

Display your SageCRM Company records in a Google Map. Pull up a company in SageCRM and then click on the S5 Maps tab it will open up a Google map window in another tab and will display the current company as the center point on the map to show you all of the other CRM companies in the area. Different color pins can be set to differentiate between Customers, Prospects, etc. on the map. You can also search the Google Map for Prospects that may not currently be in your SageCRM database.

SCRM

My CRM Manager

Sage 50 CRM integration (US and CDN Editions)

Looking for a CRM that integrates with your Sage 50 system? Look no further! We publish the integration between Sage CRM and Sage 50. This includes both the US (Peachtree) and Canadian (Simply) editions of Sage 50.

SCRM S50NA

CRM Together

Crystal Manager for Sage CRM

Allows Crystal Reports to be accessed within Sage CRM in context and based upon several data sources e.g. ERP & CRM

SCRM

Sage Third- add-

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CRM Together

Accelerator for Sage CRM

A powerful Outlook Integration tool that allows the user to navigate, update & review CRM data from within the Outlook window.

SCRM

CRM Together

MobileX for Sage CRM

A Progressive Web App for Mobile access to Sage CRM data. Mobilise your sales team to update customer information on the move from any smart device.

SCRM

Orbus Technologies

Orbus CRM Shopping Cart

Orbus CRM Cart facilitates the creation and management of standard Sage 300 Transactions outside of Sage 300 in CRM. These Sage 300 Transactions are managed using either our standard Sage CRM Sage 300 Process workflow which is included, or a workflow customised to your requirements. Orbus CRM Cart has modular processes for Sage 300: Sales; Delivery and Purchasing.

SCRM S300

Qmulus Solutions

Qreations

For many years Qmulus has been creating integrations and enhancements for Sage products to add extra value to our customers. Over time we noticed that certain requirements kept being asked for over and over again and so we decided to create a set of enhancements that added immediate functionality for customers with little or no additional customisation required. We call these enhancements Qreations.

SCRM

Spire BMS Limited

Microsoft Teams Integration for Sage CRM

The Spire Sage CRM Connector for Microsoft Teams makes collaboration and communication about customers, prospects and suppliers easy and smooth. Create cards against Opportunities and Cases and track and discuss your team's progress in your channel and view CRM data without leaving Microsoft Teams.

SCRM

Blytheco, Inc.

Databridge

DataBridge enables a Sage CRM web user to access on-premise Sage 100 data from any location. Access Sage 100 data in real-time through a robust framework of pre-built dashboards, screens, tabs, and reports.

SCRM S100

Leading Edge SRL

Editable Grids

Editable Grids for Sage CRM is a flexible, smart, and easy-to-use grid component which brings rich in-cell editing capabilities for CRM records

SCRM

Qmulus Solutions

Qnect 50 and Qnect 200

Qnect for Sage CRM is a real-time integration that links Sage CRM to Sage 50 or Sage 200. It helps to increase efficiency and accuracy in the management of customers/suppliers, products and quotes/orders at an affordable cost.

SCRM S50UK S50NA S200

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CRM Together

Customer 365

Provide excellent customer service with your own company branded Sage CRM self-service portal

SCRM

Greytrix

GUMU™ Sage 100 CRM Integration

Connecting Sage 100 with Sage CRM means we can provide customer-facing staff with the option to view accounting data and create orders through the Sage CRM interface. This is a fully bi-directional solution where users can have access to Sage 100 data wherever and whenever they log into Sage CRM.

- Sage CRM users do not require a license for Sage 100
- Sage 100 does not need to be the latest version
- Of all the GUMU™ integrations out there (Sage 100 to SFDC, Sage 100 to MS-CRM, etc.), the integration between Sage 100 and Sage CRM is the best/deepest.

SCRM S100

Spire BMS Limited

Companies House Integration for Sage CRM

Companies House is a UK government-run organisation that incorporates and dissolves limited companies. It registers company and director information and makes it available to the public and via an API. The Spire integration allows easy access to this data for presentation within the Sage CRM interface.

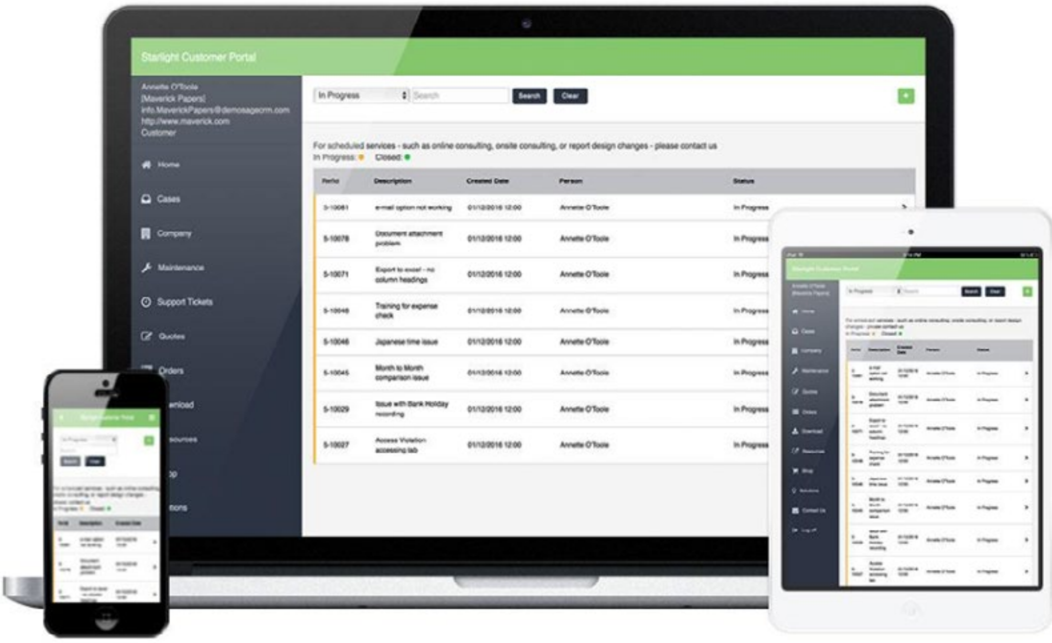
SCRM

Greytrix

CTI Framework

The Sage CRM CTI Framework is a flexible and open-ended infrastructure applied on top of Sage CRM. This system accommodates both inbound and outbound calls. It allows you to set your own rules for routing calls and allows for automatic actions on incoming and outgoing calls.

SCRM



Are you missing out on utilising self-service?

CASE STUDY
Marc Reidy, CRM Together

The Business Challenge

The business needed a central place to message their resellers.

Online ordering was required

Access to historical invoices

Sales analysis for resellers.

Sales reps can help their resellers

The Business Solution

Using the CRM Together Customer365 self-service portal, access to Sage CRM can be controlled.

The resellers can see a dashboard created in power BI that shows the Sage 100 connected data.

Resellers can create new orders online easily using the rapid item picker. These orders are submitted and then processed into Sage 100.

The Sage 100 invoices were also exposed accessible via a search/list screen in the portal.

The initial landing page shows the news page for the resellers so they can see the latest news and information from the customer.

Business Benefits

Reduces business hour phone calls and frees up staff to do other things.

Customers can build their own orders.

Software used

Sage CRM, Sage 100, Customer365, Rapid Item Picker (Open Source Tool from CRM Together)

Industry

Distribution

Standardizing the quoting and quote follow-up systems

CASE STUDY

Don Grubor , Effective Solutions

The Business Challenge

Existing Quotes are created by the salesperson in Word or Excel with formats they have come up with. Each salesperson's quote templates can look different. When a quote becomes an order a customer service person then needs to re-enter the information into Sage 100 as an order. There is no simple way for the salesperson to pull up all of their open quotes and follow-up on them.

The company would like to go with a standard quote process and template that all salespeople use, and that gives them the ability to convert the quote to order without having to re-enter the information.

The Business Solution

The solution was to implement a SageCRM system integrated with their Sage 100 ERP/Accounting system. This gave them integrated quoting, so the salesperson now created an opportunity in SageCRM and then created a quote within the Opportunity. This quote is integrated with Sage 100.

A custom quote template was created in SageCRM so the sales user could simply click on a SEND QUOTE button and email a PDF version of the quote to the customer/prospect. When the customer decided to move forward with the quote the customer service person could pull up the Quote in SageCRM and promote it to an Order. Data re-entry was eliminated. Scripts were put in place to automatically mark the Opportunity as Sold/Won after a quote was converted to an order.

Software used

Sage CRM, Sage 100

Industry

Distribution

Business Benefits

- Standardized quoting system, all quotes coming out of their systems look the same
- With Opportunities in CRM being created for each quote, the sales team could now quickly review open quotes and prepare sales forecasting reports for quotes expected to close in the current month or quarter
- Salespeople had a list of open opportunities/quotes displayed on their dashboard for follow-up until they were marked Won or Lost
- Key Quoting metrics (Quotes Created, Quotes Open/Won/Lost) could be generated from Opportunity Data
- Data re-entry time was reduced for the Customer Service staff
- Because Salespeople needed to create Company and Person records first in CRM before creating the Opportunity and Quote, the company's CRM database quickly grew into a beneficial marketing list

by Peter Wolf
President, Azamba

Increase Customer Retention with These Simple Sage CRM Tricks

Software used:
Sage CRM, Accelerator for Sage CRM

Landing a new customer can cost five to twenty-five times more than retaining an existing customer.

Good thing Sage CRM makes it so easy to stay connected with existing customers, keep them happy, and keep them coming back for more.

There are many strategies to improving customer retention. Let's focus on three big ones:

1. Watch for warning signs
2. Be uniformly informed
3. Communicate effectively and efficiently

WATCH FOR WARNING SIGNS

Ever call a customer and hear that they moved on and are working with a competitor? Or get a call ahead of time to let you know they are pulling up stakes with your team?

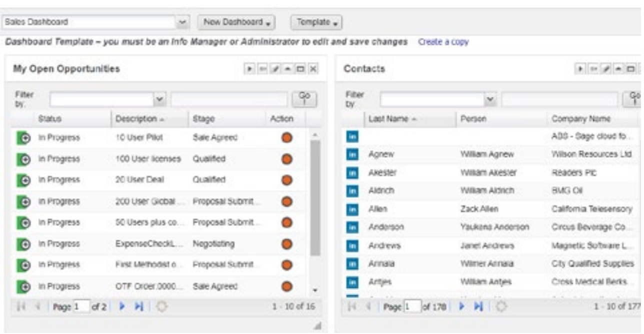
Until they invent a crystal ball, Sage CRM is the next best thing.

The Sage CRM Dashboard is a powerful and easy to configure tool that allows you to view and analyse information in a single place.

Your dashboard can provide an "Early Warning System" for your team to stave off a potential relationship ender with a customer. Imagine a dashboard with three key pieces:

- Customers being neglected. This could be customers who we haven't spoken with in a few months or even in a few weeks for your A+ customers.
- Customers in "Support Crisis". You can define Support Crisis specifically based on your business. One idea is a certain number of support issues that have piled up or maybe have remained unresolved for a considerable period.
- Customers with declining sales. This can be a simple look at Closed Opportunities for the last three months compared to the previous twelve months.

Each of those dashboard elements could be tweaked or expanded to fit your needs. **The goal is to create an easy to digest visual guide that helps you get on top of customers falling into the danger zone.**



BE UNIFORMLY INFORMED

Nothing worse than being given the run-around by vendors when you call with problems or simple inquiries.

You want to make sure that doesn't happen with your customers. You want your people to be informed across their team and across departments.

Sage CRM provides a strong, flexible way of tracking . . . pretty much everything. Everything you want to stay on top of, everything that matters to you, your team and to your customers.

A key piece of this is the way Communication records, such as Phone Calls, Tasks, Emails, Appointments, etc., are stored and tracked. Information gets entered once and is linked to other relevant records.

This means wherever you go in the system, you'll be able to get the information you need within one or two clicks.

Want to see all the Communication history for a particular customer, regardless of who on your team was involved? Pull up the Customer record, head to the Communications tab.

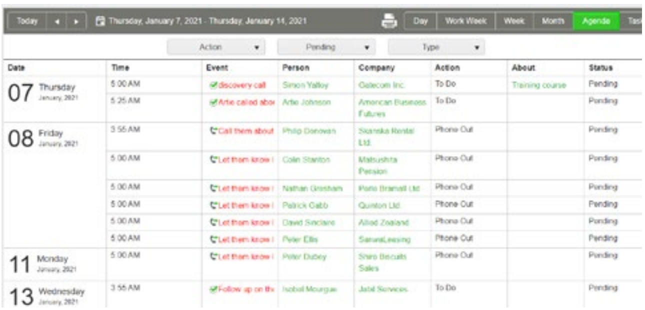
Want to see all the history for a particular sales opportunity? Same thing as before.

It's all there at your fingertips so everyone on your team can stay up-to-date with what's going on with the customers.

Even better, Sage CRM integrates tightly with most Sage accounting systems. So, in addition to the core sales and service information, you can pull up important accounting information.

When that customer calls or if you are reaching out to connect, you have full access to key information within your sales tool. No need to put them on hold. No need to go to the accounting software or ask the accounting team to assist.

You and your people have everything they need at their fingertips to respond quickly, fully informed.



COMMUNICATE EFFECTIVELY AND EFFICIENTLY

You're staying on top of things with the Dashboard and you're fully informed thanks to the accounting integration and the CRM data storage. Now you need to communicate effectively.

Sage CRM allows you to slice-and-dice your records easily either with the primary search screens or by building a marketing list (aka a group).

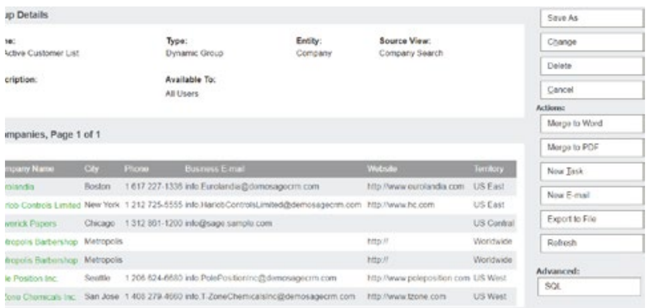
Both of these methods are easily learned and are used by account management to communicate effectively and efficiently with the selected customers via defined actions such as:

- You can do a document merge to print labels and stuff envelopes.
- You can send out emails (pro-tip: you should use an emailer like Mail Chimp to control this process).
- You can schedule follow-up tasks for people or groups of people on your team.

A very common process is to create a list around key criteria – such as "all customers that own a specific product" – and then do a combination of all three of those actions to introduce a great complementary product to their existing product.

Send a postcard about the new product, send an email, schedule follow-up calls, send a follow-up email . . . rinse and repeat.

Another trick with effective communication is to look at the CRM Together Accelerator product which is indispensable if your people spend a lot of time in Outlook. Among other things, Accelerator tightly integrates Sage CRM with Outlook and will help your team reach the goal of communicating effectively and efficiently with customers.



NOW MAKE IT HAPPEN

These ideas are meant to be idea starters. Your business will have your own unique needs and you will want to tweak these suggestions to match those needs.

The key take-away is Sage CRM is a great tool for staying on top of things and improving customer retention. Many customers aren't taking full advantage of the product capabilities.

It's significantly cheaper to keep a customer than it is to find new ones so call your Sage partner and bounce around these ideas. Invest in your Sage CRM and watch your customer retention explode.

by Dan Cousins
Practice Manager, My CRM Manager

The Evolution of the Sage 100 CRM Integration

Sofware used:
Sage CRM, GUMU™, Sage 100 CRM

When Sage first released their integration between Sage 100 and CRM in 2013ish, everyone was so excited. (Who doesn’t want an integrated system – right?)

However there were some hurdles to overcome, for example, while Sage CRM can be accessed anywhere through a browser, the integration with 100 only works when the CRM user is connected to the network. It also requires the Sage 100 application to be installed on the user’s workstation, since the integration opens Sage 100 screens from within Sage CRM.

For deskbound Sage 100 order entry staff, that style of integration was perfect as it (a) gives them CRM, and (b) doesn’t require much retraining.

Because Sage CRM encourages 3rd party integrations, a Sage CRM Development Company, Greytrix, were able to deliver a new style of integration.

GUMU™ ‘Greytrix Universal Migration Utility’ leverages a lot of the fundamentals of Sage CRM and integrates with 100 at server level. This means that the integration works just like Sage CRM – from anywhere an Internet connection can be found.

A win, win for everyone!

by Aleksandra Tomczyk
Intensity Physiotherapy Clinic

Top 5 tips to Manage Neck & Back Pain

Take care to invest in a comfortable, good quality office chair, look for shaped seating, lumbar support and adjustable armrests

Remember to take consistent short breaks (at least every 45-60mins for at least 5mins at a time, try to walk away from your desk

Every so often take a few stretches to relieve tension from your neck shoulders and back

Change body position every now and again during office work

Get some fresh air every day

EASY STRETCHES TO CONSIDER DOING DAILY

1. CHEST AND WRISTS STRETCH
   With both hands interlaced behind the back, draw your shoulder blades together. Maintain this pose for 5 breaths. Repeat twice.

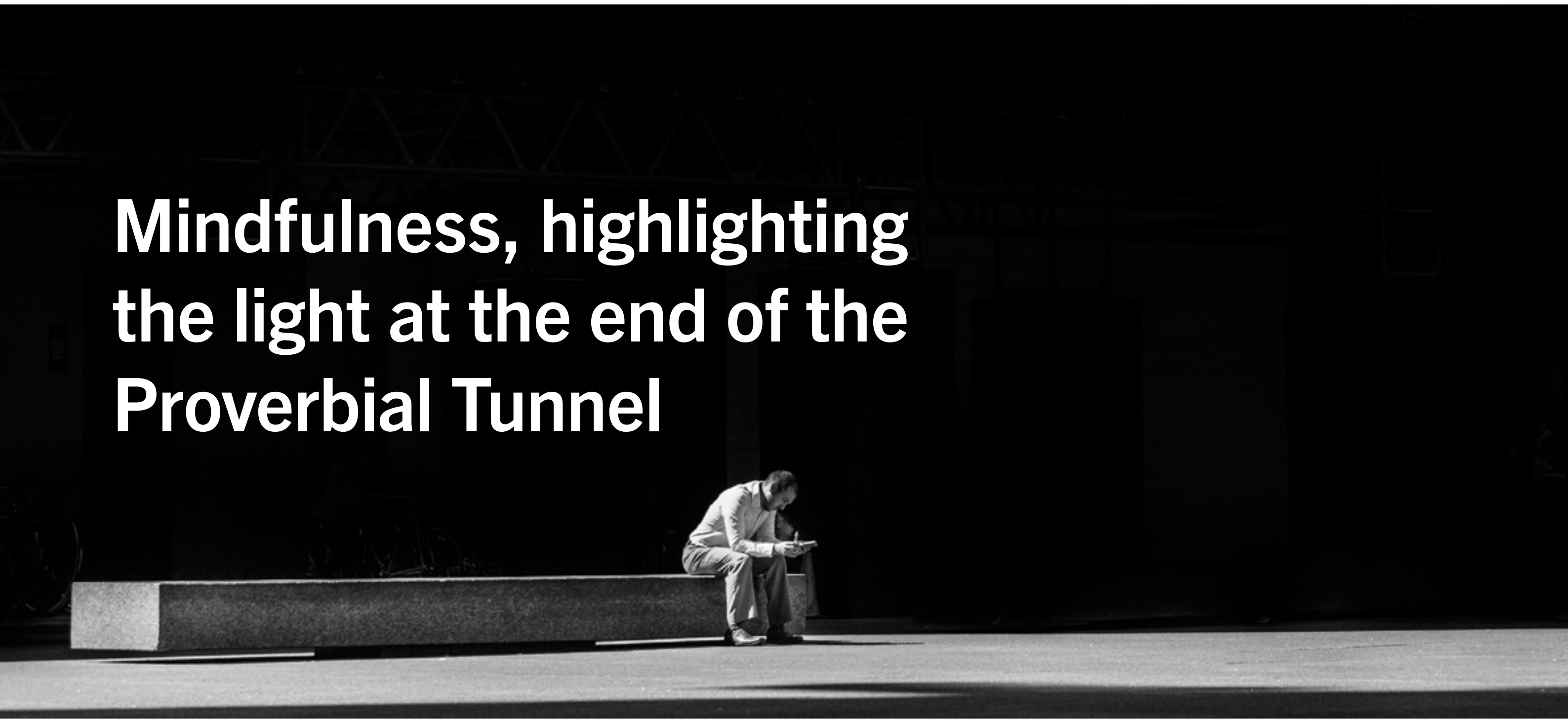
2. LOOK IN YOUR POCKET STRETCH
   With one hand, hold onto the side of your chair. Laterally flex the head to the contralateral (opposite) side. Rotate the neck -look down like you are looking in your pocket. To amplify the stretch, bring your free hand to the side of your head to apply gentle pressure. Hold for 30 secs. Repeat the same on the other side.

3. SEATED TWIST
   Bring your right hand to your left knee, twisting your torso so that your left hand rests behind you. Hold for five breaths, stretching taller through the crown of the head. Come back to centre and repeat on the other side.

4. WRIST EXTENSOR AND FLEXOR STRETCHES
   Hold your arm outward with the palm facing down. Catch the fingers of the upward extended hand with your other hand. Gently pull your fingers upwards until you feel a stretch on the underside of your wrist. Hold for 5 seconds. Gently pull your fingers downwards until you feel a stretch on the front of your wrist. Hold for 5 seconds.

5. STANDING BACK EXTENSION EXERCISE
   Stand up. Place your knuckles in the centre of your lower back (where it aches). Bend backwards as far as you can. Hold for a second and return to an upright position. DO 10 in a row.

by Sharon Collopy
The Gentle Lifestyle



Mindfulness, highlighting the light at the end of the Proverbial Tunnel

We so often hear about the light that can be found at the end of the proverbial tunnel, but right now the world seems to be stuck in a seemingly never-ending dark ‘Covid Tunnel’ with no clear light in sight.

We have witnessed changing roles and relationships during the pandemic, the heart-warming acts of charity and community, the creative ways people found to stay connected, the courage and resilience of a people who are truly good and care about doing the right thing; all of this enabling us to understand the importance of prioritising social connections during times of severe crisis.

My practice of mindfulness, I can honestly say has been a true blessing during this last year of living within a pandemic.

I know this is a very uncertain and challenging time, we must empathise with the real struggle and heartbreak that so many are living through be it social isolation or financial strain, it is perhaps at times like this that we most need to make space for ourselves.

Mental health professionals talk about applying the four M’s during times of high stress and anxiety; the four Ms being:

- Mindfulness – Practicing the art of becoming aware of our habitual thought, emotion and behavioural patterns and learning to compassionately be with however we are, whilst at the same time cultivating our ability to shift our focus and perspective.
- Mastery – Simply having a sense of getting better at something. Could be job-related or that ‘thing’ you always wanted to learn more about. Ideally at something that ‘strengthens’ you and you care about
- Movement – Get moving, go outside and connect with nature. Dance around the house to some of your favourite music and release some of those feel-good hormones.
- Meaningful Connections – We are social beings who need to connect and it’s important to keep reminding ourselves that we’re in this together. Finding ways to connect safely with family, friends and the wider community, through the many virtual means available to us and then there are those spectacular acts of kindness and charity we read about and can gift on.

The Gentle Lifestyle

So why is Mindfulness so important?

Our mind has a strong urge to find a narrative that will make sense of bad times, in this case, the Covid19 pandemic, or it could be any personal or familial journey, there is often a tendency to construct a story that shrinks down to the size of our dreaded fears.

Neuro-scientific research finds that our minds wander approximately 47% of the time; a large percentage of this wandering is towards a fearful future, with the rest ruminating upon past perhaps negative experiences. Fearing the uncertainty that our future holds is normal and only natural, but if we pay close attention, we become aware that it is often our thoughts that are the root of this fear, with these thoughts often creating worst-case scenarios, most of which do not manifest. Right now, this is not just an individual fear for the future, but also a collective fear, fed by too much negative and media coverage and so can easily alter and shape our perspective on a daily basis.

The Gentle Lifestyle is a Mindfulness Program, designed to teach the skills that will enable you to strengthen your ability to regulate, relate to and reason with thought, behaviour, and emotion; allowing you to live a more responsive life of inner contentment and freedom.

Fears are stories we tell ourselves

by Majella O'Connor
CRM Together

A customer shares their journey to selecting Sage CRM

Sofware used:
Sage CRM, Accelerator & MobileX

BRANDT has been around since the '50s, they got their start locally as a small firm in central Illinois selling anhydrous nitrogen to local farmers.

In the central belt of the US where row crop are the dominant crops e.g. corn and soya bean, nitrogen needs to be put back into the soil. Agriculture is not always as sustainable as one would hope, with a large-scale farming community, they replace what is depleted after harvest.

BRANDT offers a retail service for local farms, but they also have a speciality formulation division that expanded beyond Illinois. They bought a large Californian company for manufacturing, another company in Florida, Brazil and Spain with tight partnerships also developed in Canada, Australia and China.

BRANDT has thus grown to be a global agriculture company. In the segment of inputs, their catalogue of products is complete and robust from a simple defoamer to highly specialised areas, such as turf and ornamental servicing of golf courses internationally. In fact, one of their top distributors is based out of Kildare, Ireland.

BRANDT is in the process of rolling out Sage CRM with their current count at 38 Sage CRM licenses with phenomenal growth planned. The sales team are the primary focus initially for Sage CRM usage. The company leans towards on-premise over cloud services because of security and also the ability to extend on-premise solutions.

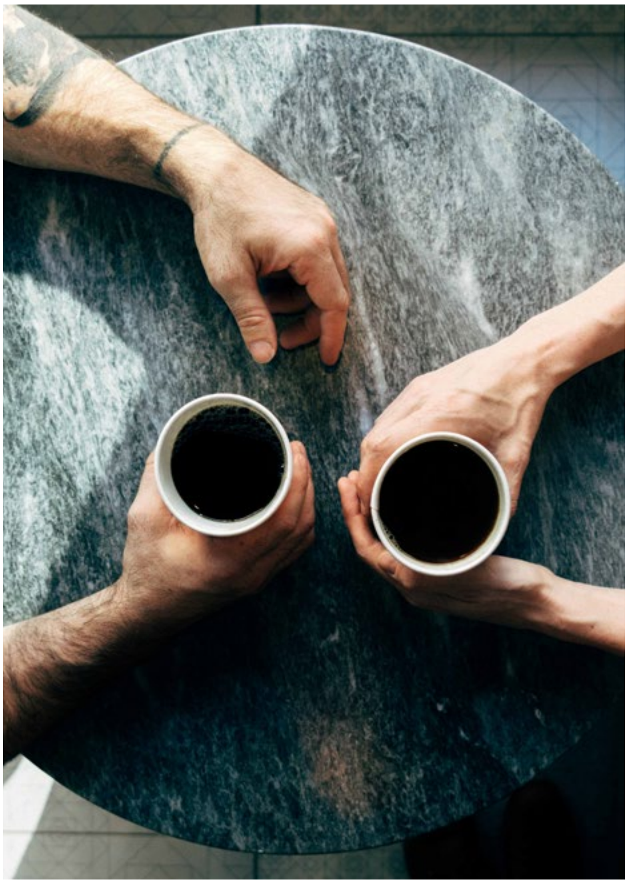
Why CRM?

BRANDT intuitively knew they needed a solution to deliver CRM capabilities and did consider several systems before committing to Sage CRM.

Their design work around Sage CRM has been based upon customising the system as a central repository.

The process, because the company is so large, has been planned over a 2-year period and is being championed by Jared Grigg as Project Manager. In his own words, as much as BRANDT wanted a solution yesterday, they gave Jared the time to prep and develop the architecture and processes they needed to complete and develop a solid blueprint for Sage CRM.

With prior attempts to handle Customer Relationship, Jared outlined some of the implementation pitfalls encountered



- The responsibility to launch CRM was left with the vendor rather than being handled internally
- Tried to tweak their processes to match a rigid program rather than the other way round
- Left the roll out to a non technical salesperson who was ill-equipped for the job
- Lost control over their data
- Leading with a system that offered a strong outlook integration but didn't have a strong structure behind it.
- Automated synchronisations from Outlook running that deposited data that was just not relevant into CRM

Why Sage CRM?

After Jared took over CRM Operations, he connected with Chicago based Sage Partner, Azamba, the business relationship flourished as did his research of add on's such as Accelerator (outlook integration) and MobileX allowing him to envisage a sold CRM roll out throughout BRANDT.

- The ability to extend the system to compliment the company processes
- Standard sql database
- Same compiling language
- Integration with ERP
- Stability of the system
- Strong Analytics available
- Outlook Integration (Accelerator for Sage CRM)
- Mobile Capability (MobileX for Sage CRM)
- The Sage CRM Community and building relationships with vendors through the network

A Customers Tips to implement Sage CRM Successfully

- Crawl, stand, walk, run, be progressive but realistic on what can be achieved
- Have a CRM evangelist / Project Manager in place to champion the use of the software with technical proficiency
- Define the processes and make the software bend to those
- Map out the processes you need to follow and ensure they are documented
- Find a Sage Partner you connect with, and who will work with you constructively Partnered with Azamba, Chicago
- Consider 3rd party solutions and include them in the implementation road map before rollout
- Take time and phase the roll-out

by Marc Reidy
Owner, CRM Together

CRMTogether

A day in the life

I am woken at a random time by a child's foot in my face. If that does not happen, I wonder are they okay.

If it's not too early I will have an internal battle trying to decide whether I get up or not. Once up I will have usually cereal, maybe some toast and tea. The kids come down and I try coax them into having cereal before putting an inch of chocolate spread on the pancakes they insist on. 'Tomorrow is my day' I think.

During breakfast I do the sudoku in the Sunday Times. Or I try to. I could be doing the same one every morning that week. It's the really difficult one now. Not the easy one.

After breakfast I get showered and ready for work and kiss my wife and kids goodbye and start on my commute back to the bedroom. We are still in lockdown. I never thought I would miss sitting in traffic.

If it's Monday I plan my week and then open my email and tear up the plan (not literally as it's in basecamp). I try keep a list of things and like most people, I aspire to clearing it, but that list refuses to wield. It just grows.

What I do on a day can vary a fair bit, but will most days be including financials, reviewing and writing blogs, updating help systems, server maintenance, project management and website content.

My favourite chore is writing software and doing research on new tools and systems. It's important to try to keep up but it is difficult as things change so quickly now. For the last year we have been updating our software stack. It has been challenging though we are just about to release our new Accelerator UI, pretty excited to finally reach that milestone. I am also a little nervous about how it will be received as change generally equals challenge.

We will make the transition easy for partners and customers, they can phase their upgrades as we will be supporting both versions for the foreseeable.

Some support issues may come in and usually can be resolved via email or remote support might be

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I've been involved in Sage CRM since 1999 back when it was a start-up called "eWare". CRM Together was officially setup in 2009, we did our first International trade show in 2011 at (TPAC) in Vancouver, it was a fantastic chance to network and build relationships that have stood to us to this day.

booked in. I deal with our partners most days and feel very privileged to be part of the Sage community.

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Lunch will be a bagel with tomatoes and cheese. I am trying to cut back on meat I tell myself, but cannot recall the last day I didn't have any.

As an afternoon treat, I have a stir in cappuccino. They're tasty! I broker a fight between my wife and the kids over homeschooling (still in lockdown remember). One of them cries,I'm mad busy I tell them and go back to work.

I listen to a lot of podcasts including "radiolab", "how I built this", "this American life" and more.

3 or 4 times a week I will go for a run. No headphones. I find it calming and a great time to work through something I might have on my mind. I finish around 6pm and note what I did for the day (this is a nice feature in basecamp that I would like to see in Sage CRM).

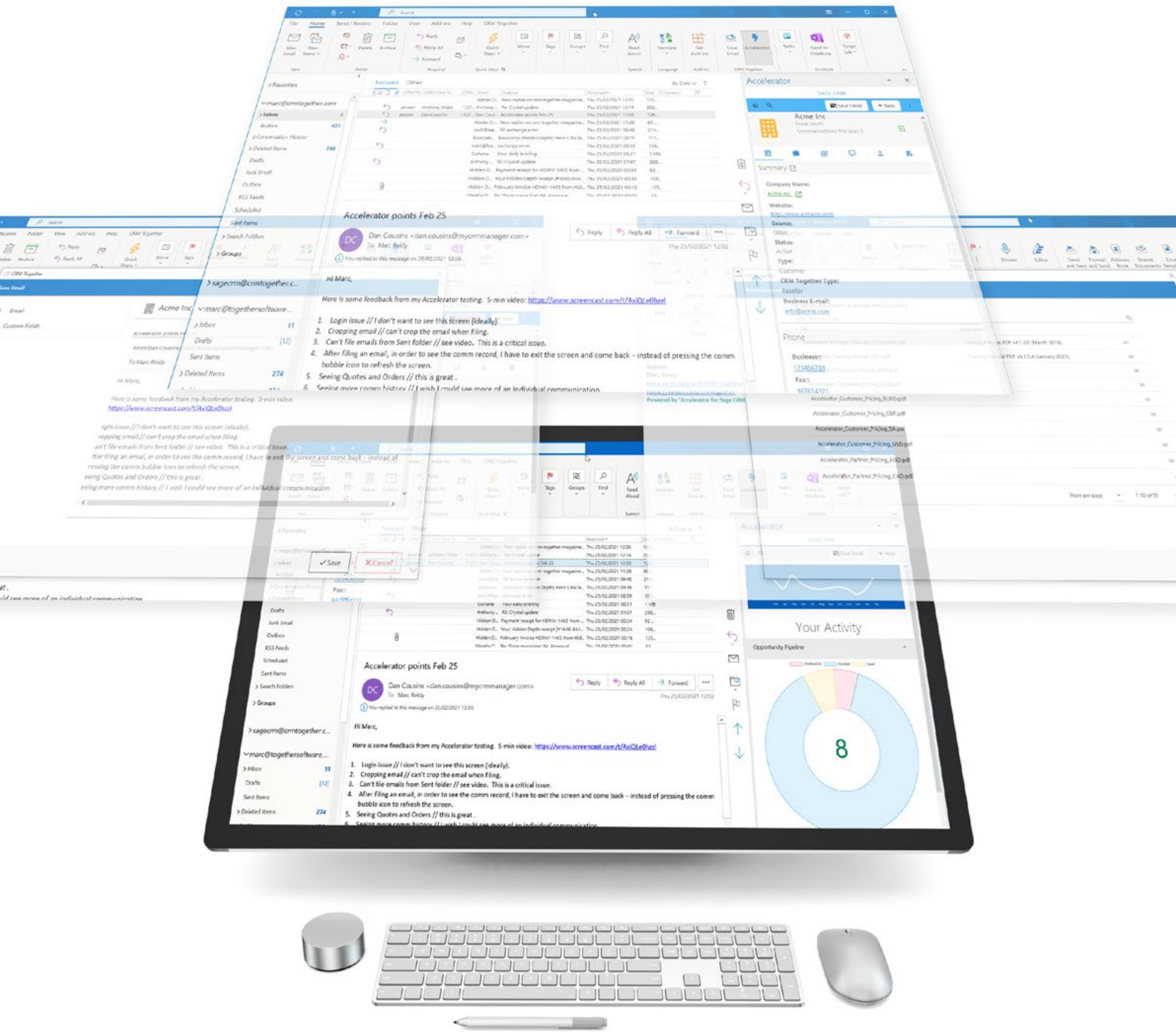
We have dinner around 6.45pm. How was your day everyone? You know already they say! And I do! Silly Daddy I am told. The kids con us into allowing them stay up late and so by the time bedtime is done there is no point watching anything. A cup of tea before bed and I off I go for some precious downtime, if I am not too exhausted, I might read something. Just finished How to Make the World Add Up: Ten Rules for Thinking Differently About Numbers. It's great!

No point setting an alarm, I've got kids!

The All New Accelerator is here...

Improve user adoption of your CRM strategy with direct access to navigate Sage CRM from Outlook.

Update and review Sage CRM, convert emails into entities, such as opportunities or cases and more...



Get in touch with your Business Partner to find out more
or contact us at crmtogether.com/contact/