

Sage ACT! 2011 | Product Brief

Make contact. Build relationships. Get results.

Somewhere between the chaos of sticky notes and spreadsheets, and the complexity of CRM solutions lives an alternative for you – a Contact and Customer Manager. Imagine having all of your associated phone numbers, emails, meeting notes, and documents within reach for all of your contacts, and being able to find and update their information instantly.

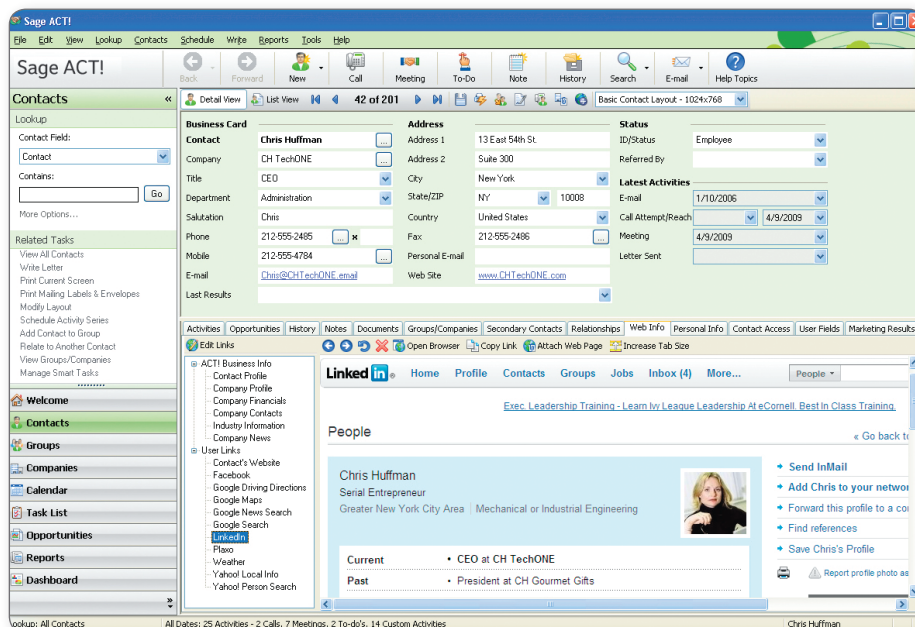
Engage in Meaningful Conversations with Customers

Sage ACT! is the #1 selling Contact and Customer Manager that enables you to have meaningful conversations with customers by giving you an organised view of the people you do business with.

Like the millions of individuals in small businesses and sales teams who use Sage ACT!, you'll always be prepared with recent emails, meeting notes, task reminders, and social media profiles, because all of these details live in one place.

You can even use Sage ACT! like a sales and marketing assistant to get the right leads, send striking marketing campaigns, and track your overall performance.

The bottom line, Sage ACT! takes care of the administrative stuff so you can focus on building long-lasting, profitable business relationships.



Manage relationships by keeping everything – contact details, emails, documents, social media profiles, and more – in one organised place.

BENEFITS SNAPSHOT

#1 in the world. Relax, you chose wisely. Sage ACT! is #1 selling with millions of successful customers.

Designed for you. Specifically for small businesses and sales teams like yours, that is. We focused on the features you'll actually use from day one—and into the future.

Easier than the rest. Sage ACT! leads the industry in ease of use. You can get 25 percent¹ more work done by using Sage ACT! over competitive solutions.

Priced for the cost-conscious.

You don't have to sweat about hidden costs popping up later or investing in a costly IT stack.

Personalisable.

Tailor Sage ACT! to fit your business even better. Design views, add fields and tabs, edit drop-downs, and customise templates.

Call 13 sage (Australia) | 0800 904 409 (NZ)
Contact your Sage ACT! Certified Consultant
Visit www.sagebusiness.com.au or www.sagebusiness.co.nz to learn more.

The World's #1-Selling Contact & Customer Manager

Sage ACT! Pro 2011

Which version of ACT! is best for my business?
The new version of ACT! Pro 2011 is designed to help you manage your business more effectively. It's the most powerful and flexible version yet, with a host of new features and improvements. It's the perfect solution for small and medium-sized businesses looking for a contact and customer management system that can grow with them.

Get more done

Organise contact details

Stay in sync

Market like a pro

Control your sales pipeline

sage

sage

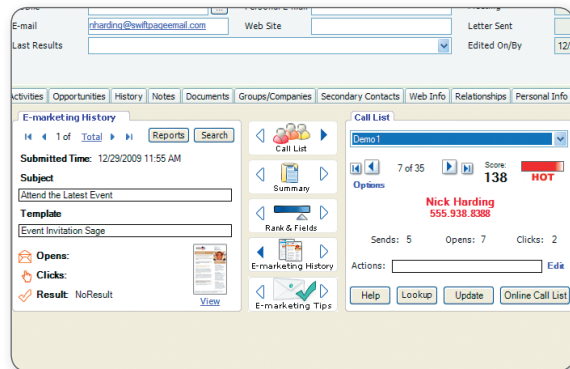
Compatible with Windows 7

Become Organised So You Are Instantly Prepared

Organise your information with Sage ACT! so you can zoom in on the details of your customer relationships whenever you need to. When customers call unexpectedly, you're instantly prepared with the email they sent you last week, notes from your last phone call, and their Facebook profile to see what they've been up to – all at your fingertips.

Jump-Start Your Marketing Efforts

Now add rocket fuel to your sales and marketing strategy with Sage E-marketing for ACT! – a cloud-based email marketing service that enables you to execute sophisticated campaigns, while leveraging and building on your existing Sage ACT! data. Capture additional leads with web forms on your website, nurture those prospects automatically with drip marketing plans, and quickly identify your hottest leads using a ranked call list that tells you which prospects are most interested.



- Market effectively to attract new customers and get more from existing relationships with end-to-end Sage E-marketing for ACT!

"We can easily customise the system on the fly to meet the changing need of our business and our customers. Just the other day we thought it would be great to have another couple of fields, so we just added them. The solution is extremely flexible, powerful and easy to use. We know we don't make full use of the system or take full benefit of what it can do. What we do use it for is very impressive, and we would like to make greater use of its marketing and campaign features in the future."

Stuart Roe, Director,
Roe Financial Services

Take Control of Your Sales Pipeline

Manage prospects through an out-of-the-box Sage ACT! sales process or a process that you personalise to fit your business. Keep detailed progress notes and see the probability of close for each opportunity. This gives you total visibility and control of your sales pipeline so you can stay in contact with those opportunities most likely to close.

Get More Done on Any Given Day

Let Sage ACT! Smart Tasks handle the things you need to get done every day. Think of this as a personal assistant that puts activities on your calendar and sends emails for you. It doesn't matter whether your tasks have two or 10 steps, it's all automated so your customers get the service they expect, with little work required by you.

Get started with one of many sample Smart Task templates, and accompanying email templates, for the most common activities. These Smart Task templates will set in motion the most basic or advanced processes that allow Sage ACT! to remind you that it's your best customer's birthday, inform you of customers that haven't heard from you in a while, even welcome that new customer who just placed an order.

The screenshot shows the 'Manage Smart Tasks' window. On the left, a list of templates includes 'Birthday Reminder', 'Closed Opportunity Follow Up', 'Contacts with no recent activity', 'E-marketing: Birthday Greeting', 'E-marketing: Incorrect/Missing Information', 'E-marketing: New Contact Welcome', 'E-marketing: Blue Opportunity Alert', 'E-marketing: New Contact Welcome', 'E-marketing: Opportunity a Week from Close', and 'E-marketing: Additional Sales Cycle - Product Enquiry'. The 'E-marketing: Birthday Greeting' template is selected, showing its description: 'On contact's birthday, send a Happy Birthday e-mail using Sage E-marketing for ACT!'. Below the description, it lists 'Access: Public', 'Record Type: Contact', and 'Trigger: Runs every weekday at 9:00 AM.'. To the right, a workflow diagram shows a step 'Send Birthday E-mail' with the text 'Happy Birthday from all of us!' and an 'Add Step' button. An inset image shows a birthday card with 'HAPPY BIRTHDAY' in colorful letters and a red banner that says 'From all of us!!'. Below the card, the text reads: 'Happy Birthday Stephanie, We at Sage hope you have a great day and look forward to speaking with you soon.'

- Amp up your emails by using professionally designed email marketing templates³ that complement your Smart Tasks.

"ACT! forms the hub of our business. It literally drives everything we do including all our contacts, our to-dos, all of our communications, and all of our sales opportunities...I've noticed an increase in the level of professionalism from everyone in the team in terms of the sales process. The new system has allowed us to be a lot more focused, and has encouraged us to follow through more professionally on requests and enquiries."

Edwin Trevor-Roberts, General Manager,
Trevor Roberts Associates

"I think it's absolutely the best value for money. You might upgrade occasionally, but you don't pay an ongoing fee. Once you buy the licence it's yours."

Nick Bottrall, Director, Executive Institute of Management

With Sage ACT! you can:

Manage Relationships	Keep everything – phone numbers, emails, conversation notes, meeting and activity history, documents, social media profiles, and more – in Sage ACT!
Search and Instantly Access	Find the exact customer relationship details you need using the most basic keyword search to a more advanced field search.
Be More Productive	Work more efficiently with Smart Tasks that automate key activities like sending emails for you and putting activities on your calendar. Get started with one of 10 pre-loaded Smart Task templates ³ or simply customise your own version.
Market Effectively	Create and send email and drip marketing campaigns, track open and click-through rates, and manage opt-outs with Sage E-marketing for ACT! ²
Sell More	Track each lead through the sales process where you can capture detailed progress notes, include your products and services, and see the probability of close.
Measure Results	View 50+ reports and dashboards, or for deeper analysis, send most reports to Excel [®] and use connections to third-party report writers.
Integrate with Existing Business Solutions	Take full advantage of familiar solutions you've already invested in, including Microsoft [®] Outlook [®] , Word, Excel, and Lotus Notes [®] – over 10 business solutions in all.
Eliminate Double Entry	Integrate your Sage ACT! and Outlook contacts and eliminate double entry, plus keep your calendars in sync – no matter where changes were made.
Personalise Sage ACT!	Tailor Sage ACT! to fit the way you run your business by designing views, adding fields and tabs, editing drop-downs, and customising templates.
Administer and Maintain	Use Silent Install ⁴ administration and activation, and take advantage of automatic backup, maintenance, and synchronisation options.

About Sage Business Solutions

Sage Business Solutions is one of the leading suppliers of business management software and related products and services in Australia and New Zealand. Sage Business Solutions has an extensive suite of world-class CRM and ERP solutions designed to increase productivity, reduce costs and provide competitive advantage for large and small businesses ranging from enterprise with over 500 employees to single office/home office operations.

Sage Business Solutions is a subsidiary of The Sage Group plc, a leading international supplier of accounting and business management software for small to mid-sized businesses around the world. Formed in 1981, Sage was floated on the London Stock Exchange in 1989 and the Group now has 6.1 million customers and employs over 13,800 people worldwide.

Important Note:

Sage ACT!: You must purchase one license of Sage ACT! per user. Scalability varies based on hardware, size, and usage of your database. Review Sage ACT! system requirements at www.act.com/2011systreq. Visit www.actolutions.com or contact your add-on product provider to determine compatibility for your add-on products. Sage ACT! 2011 now supports Firefox[®] 3.5 and 3.6 and 32-bit version of Microsoft Office 2010! **Sage Connected Services for ACT!:** Sage E-marketing for ACT! is powered by Swiftpage.[™]

¹ Based on a Keystroke Level Modeling competitive study conducted by Sage and Measuring Usability, LLC in May 2009. Competitors included Microsoft Dynamics[®] CRM and Salesforce.com.

² Requires additional subscription.

³ Three of the pre-loaded Smart Task templates require a subscription to Sage E-marketing for ACT!.

⁴ Delivered as an MSI package. Software to distribute an MSI package is not included. Silent Activation on machines requires Internet access. Users must be machine administrators in order to activate. Silent Install is only available in Sage ACT! Premium.

*Certified Consultants are third-party vendors. Sage and its affiliates are in no way liable or responsible for claims made related to the services provided by third-party vendors.

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