Exceptional Customer Service with the Sage 200 Suite

Providing quality customer care and maintaining satisfied customers is a challenge for every business. The Sage 200 Suite's customer service capabilities are designed to help you manage and resolve your customer queries and issues efficiently and effectively by providing you with an easy-to-use user interface and powerful feature set.

The intuitive Sage 200 CRM interactive dashboard allows customer service staff to easily view real-time customer information and resolve their issues effortlessly by employing the escalation features of CRM. As a result of tight integration with financial and commercial data, Sage 200 drives deep business process automation right across the organisation from back office to front office. Customer service staff have access to back- and front-office customer data for a complete 360 degree view of every customer; making every customer interaction more informative and effective.

Case Management

Sage CRM provides the customer care team with the ability to record customer queries/incidents which need to be followed-up. If a case is not followed up within the time allocated, it will automatically trigger an escalation procedure to inform the customer services manager. This ensures that customer cases are attended to in a timely manner and that issues do not get lost 'between the cracks'. Cases can be tracked and actioned directly from the interactive dashboard without the need to switch between screens, maximising the productivity of agents.

Knowledge Base

Sage 200 provides central knowledge base capabilities for technical solutions to known issues or questions. This provides agents with easy and immediate access to a central bank of information and keeps accurate records of contacts with customers via case tracking and communication logs. Customer service staff can find a solution to a customer query quickly and easily which ultimately results in improved customer care. A full workflow approval process ensures that only solutions which have been reviewed and approved by the relevant manager is published in the knowledge base.

Workflow

The ability to define customer care processes and escalation points is controlled and managed by automated workflow. If a customer service case or query remains unresolved for longer than the predefined time, the workflow process triggers an automatic escalation notification to the customer care manager.
This alert is a powerful automatic reminder that ensures each case is followed up on. Workflow can be fully customised in order to ensure that cases are progressed in accordance with company-specific requirements.

Benefits Snapshot
Increases productivity of customer support representatives
Assists with performance management and motivates staff
Provides self-service facility to customers around common issues
Enables customer issues to be tracked and responded to, regardless of who answers the phone or receives the e-mail
Ensures issues never "get lost between the cracks"
Monitors service performance against service level agreements
Reduces customer support costs
Reduces the average time to resolve an issue
Increases the number of queries resolved on first contact rate
Leads to decreased number of service escalations
Leads to increased customer retention
Leads to decreased cost of customer retention
Captures feedback from customers on product/service issues
Enables benchmarking/score carding of customer service operations on an on-going basis
Reduces time spent researching issues by recording and centralising customer interactions
Enables staff to meet customers' expectations
Delivers a single view of relevant and comprehensive information on interactive dashboards and workspaces
Empowers the customer service team to provide a consistent and excellent service to customers

Reporting

Sage 200 CRM provides powerful reporting capabilities which make it easy to monitor and measure customer service performance. Reports and dashboards provide overview information and detailed analysis on metrics such as call volume, case resolution times, communications and follow-up statistics. Customers can be provided with customised reports to demonstrate that the resolution criteria within their SLAs are being met. These can be displayed on the interactive dashboard for quick and easy access and analysis.

Team Management

Sage 200 provides management with a powerful tool to monitor agents' performance. Managers can assess quantitative metrics such as case volume and the case resolution times, as well as qualitative metrics such as the prioritisation of cases and overall customer satisfaction which can be displayed on the interactive dashboard for ease of reference. This means that staff are motivated and fully equipped to resolve customer issues and customers receive a more meaningful and personalised service.

Web Self-service

Sage 200 offers a web self-service module that enables businesses to allow their customers, partners and suppliers to access a subset of their Sage 200 CRM data and functionality over the web at their convenience. This capability can be fully integrated within your own website, ensuring that your customers benefit from an entirely seamless experience.

Sage 200 Suite Integration

The Sage 200 Suite provides tightly integrated front and back office data, and this sharing of vital financial and commercial information means customer service staff have access to key customer data enabling a true single view of the customer.

For example, customer service staff can easily check the availability of stock across different locations and can check the real-time status of orders without having to rely on multiple, disparate systems or consulting colleagues who may not be available. This enables you to give accurate information to customers without delays, thereby improving customer service and driving customer loyalty.

The Interactive Dashboard

The interactive dashboard provides the customer service team with an intuitive and customisable workspace from which they can manage and control all customer queries. This provides agents with a holistic view of the customer and enables them to better serve customer needs.

You can view communications, contacts, leads, opportunities or cases all through the interactive dashboard. This ensures that customer service staff are equipped with the most accurate and up-to-date information at their fingertips regardless of where it is located within Sage 200 CRM, enabling you to provide a consistent and excellent customer service at all times.

The interactive dashboard can be customised to display relevant information from within Sage 200 CRM or feeds from websites. You can choose to use the pre-installed customer service dashboard available out-of-the-box or customise your own dashboard or team dashboard to create a bespoke workspace to suit your needs.

The interactive dashboard allows your customer service team to monitor customer cases from the one workspace, boosting agent productivity and making your staff more responsive.

"When we started the process of implementing Sage 200 CRM the world was fully functioning. However, it's only since the recession began that we are seeing the full benefits of having a CRM system. It's about making it easy, having greater customer focus and providing a proactive service to our customers. Sage 200 has allowed us to understand where all our customer support issues are, what issues are reoccurring and what actions we need to address. It's also about making our sales team more proactive and getting value from the calls they make. Every call has to have a purpose or an opportunity. We customised the pipeline concept in Sage CRM to reflect this investigation of opportunities and automation of the sales process."

David Walsh, Finance Director, Sign + Digital

Connect with Sage

- Over 25 year's experience.
- Over 5.8 million customers.
- 1/3 of the FTSE 100 use our software.
- A network of over 160 Sage 200 -certified partners specialising in business applications.
- Total cost of implementation and ownership is half that of its closest competitors.
- Sage is the 3rd largest ERP solution provider to businesses worldwide.
- Every postcode area has a business using Sage's mid market solution.
- 1000 independent and dedicated Developers who have already built thousands of applications for the Sage 200 Suite

For more information call **0845 111 99 88**
or visit **www.sage.co.uk/sage200suite**

Sage (UK) Limited, North Park, Newcastle upon Tyne, NE13 9AA
Tel 0845 111 9988 Fax 0845 245 0297 www.sage.co.uk