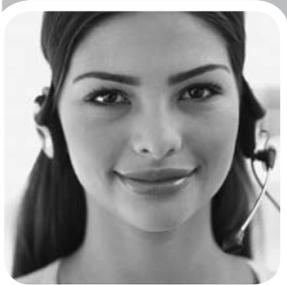


SAGE SALESLOGIX



## Sage SalesLogix Product Strategy and Vision

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## Introduction

In 1997, Sage SalesLogix was introduced as the first sales force automation product developed specifically to meet the needs of sales professionals and sales management within small and midsized businesses and departments of enterprises. Today, 10 years later, Sage SalesLogix remains a lasting, high impact product that has helped more than 8,500 companies and 300,000 users succeed. During this time, Sage SalesLogix has evolved to become a complete, integrated Customer Relationship Management (CRM) suite that includes Sales, Marketing, Service, and Support functions, as well as Business Analytics, Enterprise Resource Planning (ERP) integration, and Mobility solutions.

Sage SalesLogix has received multiple industry awards and has demonstrated success with organizations of all sizes due to its high levels of end-user adoption. This can be attributed to many exceptional features including the rich user interface, extensive customization capabilities, and flexible deployment and access methods including Windows, Web, and mobile that support both connected and disconnected users. In addition, a key area to the success of Sage SalesLogix and our customers is our extensive, dedicated channel of business partners. Sage Software products are available exclusively through a business partner channel to ensure our customers benefit from the knowledge and hands-on experience of local partners to make their implementation and ongoing usage of Sage SalesLogix successful.

The CRM market has undergone several stages since its inception—ACT! by Sage created the contact management category in 1987 and that evolved to add sales force automation with Sage SalesLogix taking a leadership position early in that category. The market further evolved to include CRM which is intended to enable a 360 degree view of the customer. Organizations have many choices when evaluating CRM alternatives in today's market. Sage Software believes that any one customer must have the option to own a system that can fit multiple deployment scenarios and that supports a range of access methods to accommodate how individual users work within their organization. Claims of hosted, no-software solutions are often rigid and limiting to customers and advocated by vendors that don't have solutions offering customers options to integrate CRM to existing systems that may be better suited for their entire organization. CRM is a business solution that can span from a single department deployment to a solution that affects every department within an organization. It must be considered by functional business leaders within all departments and not selected as a part of an existing IT stack extension. Such approaches fail to incorporate the combination of user, departmental, and organizational needs.

Sage SalesLogix has been a pioneer in sales force automation and also highly successful in the CRM market. Sage Software continues to be a leader by recognizing the evolving needs of small and midsized businesses and addressing them with the products, deployment methods, and services that best serve their requirements. This whitepaper provides existing and prospective Sage SalesLogix customers with a look at how the product is positioned in the CRM market today, where the market is moving tomorrow, and a glimpse into the future direction and strategy for the Sage SalesLogix product line. As we continue to observe market requirements and gather customer feedback, our vision for Sage SalesLogix will continue to evolve and change.

*A key area to the success of Sage SalesLogix and our customers is our extensive, dedicated channel of business partners.*

## Overview

Organizations select a CRM solution to enhance their overall business performance. Based on our experience, most organizations consider five critical success factors when evaluating how a solution will optimize their business. The first is the overarching desire to obtain **Customer and Business Insight**. Second, to maximize user adoption it's important the solution develop a reputation that **Works the Way I Do**. Third, to keep up with today's work from anywhere at anytime the solution must enable a **Flexible Workforce**. Fourth, to achieve and maintain an acceptable Return on Investment (ROI) customers require a solution they **Can Afford and Manage** now and in the future. And finally, since the CRM solution is at the heart of a business there are many integration demands (e.g. back-office systems, external systems of partners, and Internet services), thus an effective implementation truly needs to be a **System without Borders**. Sage SalesLogix has built its strategy around these five core areas. This whitepaper will explore these five cores areas by examining the CRM market from the following points of view:

- Current Market and Opportunities
- Sage SalesLogix Today
- Sage SalesLogix Vision

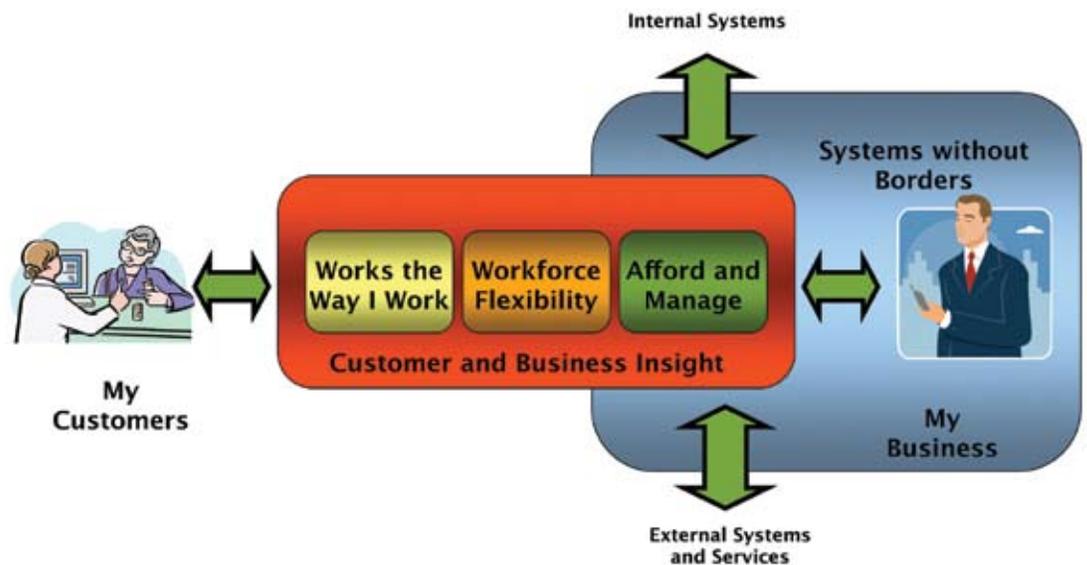


Figure 1: Five critical success factors when evaluating a CRM solution.

## Customer and Business Insight

### Current Market and Opportunities

The core feature areas of today's CRM solutions remain Sales Force Automation, Marketing, Customer Service, and Support. These areas are well evolved and generally fulfill the need to capture information within the system, provide coordinated collaboration between users and teams, and make it relatively easy to search and find information of particular interest. Systems are available in licensed and on-premise models, rented or leased using Software as a Service (SaaS) models, and also as hybrids. In addition, the market is seeing considerable growth and interest in basic analytics. This is driven by several needs. One is the desire to fully understand customer behaviors and ensure organizational focus on customer retention. Another is organizations need the ability to understand where their business processes can be optimized to better support the customer. Basic analytics provide easy and turnkey access to relevant operational details. Key Performance Indicators (KPIs) are emerging to enable managers to establish, measure, and manage desired performance metrics.

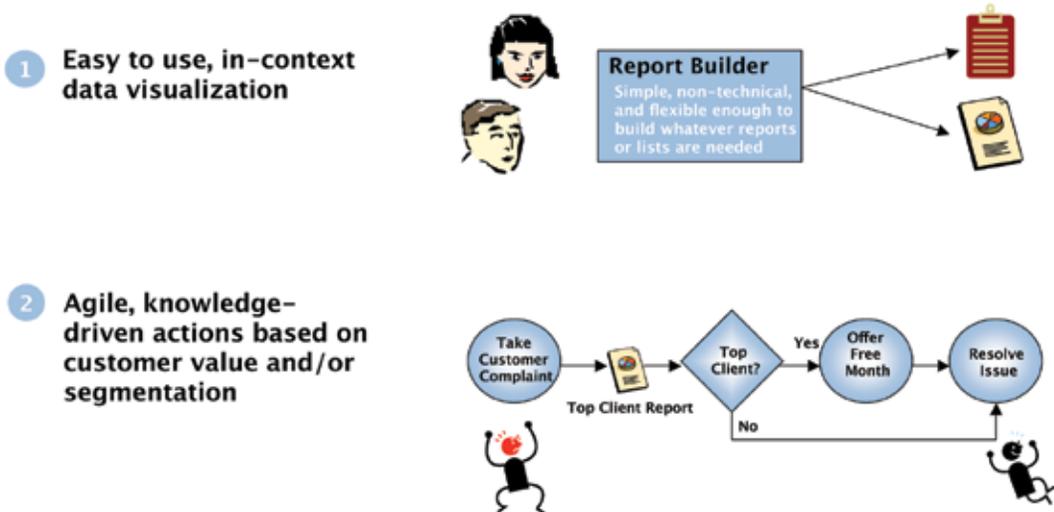


Figure 2: CRM users need to quickly build reports and understand customer value.

While CRM systems bring together the key functional areas and provide reporting capabilities, there remain substantial unmet needs. Typically, the first area in which organizations experience challenges is maintaining the quality of their data. Dealing with duplicate records, similar records, branches of the same customer, and incomplete or missing data are some of the common hurdles organizations experience. In fact, many organizations report that one of their first CRM insights is how poor their data quality is and the effect of this on their ability to truly reap the benefits of CRM.

Next, while the systems are typically hailed as generating increased user productivity, one of the primary requirements of CRM is compilation or roll-up of key data for management reports. While very helpful to managers, the typical CRM user is left feeling that they spend considerable time entering data for the benefit of others and desire a more personal benefit from the system.

Creating ad-hoc reports and lists of insightful information remains elusive to most users due to the expertise or training required to perform these tasks. To benefit from the stored information the user must often request the help of others to create reports that match their detailed criteria. Such reports are time consuming and rely on the availability of experts.

Even though there is considerable information about customers within a CRM system, having helpful knowledge available at critical moments is another unmet need. For example, service representatives rarely have real-time insight to the overall business value of the client they are currently speaking with. If they were presented with such information while interacting with the customer, they could tailor their discussions and solution offerings appropriately.

**Sage SalesLogix Today**

Sage SalesLogix delivers robust functionality that enables users across the functional areas of Sales, Marketing, Customer Service, and Support to collaborate so they can better communicate with and service prospects and customers. Simple reporting is supported with convenient export of data to Excel and moderate reporting needs are available using Crystal Reports. Sage SalesLogix supports a multi-tiered approach to business intelligence that recognizes:

- Strong end-user adoption is driven by high levels of usability from built-in features such as at-a-glance dashboards
- Organizations require the ability to customize and extend upon basic reports and dashboards
- Business process management necessitates visibility across front-office and back-office applications

*In fact, many organizations report that one of their first CRM insights is how poor their data quality is and the effect of this on their ability to truly reap the benefits of CRM.*

A powerful business intelligence solution, Sage SalesLogix Visual Analyzer, offers in-depth analytics and provides detailed and highly relevant information. SalesLogix Visual Analyzer comes with pre-built content and standard dashboards to provide ease of use and powerful insights without lengthy set-up or configuration. These analytic capabilities support comprehensive drill-down and roll-up capabilities that make it easy for users to quickly get the sales, marketing, and support information of interest. Data entry is enhanced by convenient prompts if a contact name already exists to avoid double entries. Additional data cleansing is supported by a range of high-quality, third-party partner products which further assist with simplifying data maintenance.

## Sage SalesLogix Vision

Your CRM data is a major repository of customer information. A CRM system should automatically present insightful information to the user in a highly meaningful, user-selected format that is customized to their roles. It is important that a CRM system generate alerts and notifications based on background analysis that is presented to the user in visually effective dashboards and highly efficient lists. Once presented with the most relevant data for a given task or scenario, a user should have the option to drill down for additional detail by applying group selection and other criteria to quickly arrive at robust information and take immediate action if necessary. Businesses can also benefit from predictive analytics to perform extensive “what-if” modeling of scenarios. For example, a marketing person would be able to study the impact on total lead count for a given campaign by varying the mix of e-mail, direct mail, and other methods while holding total budget constant.

*A CRM system should automatically present insightful information to the user in a highly meaningful, user-selected format that is customized to their roles.*

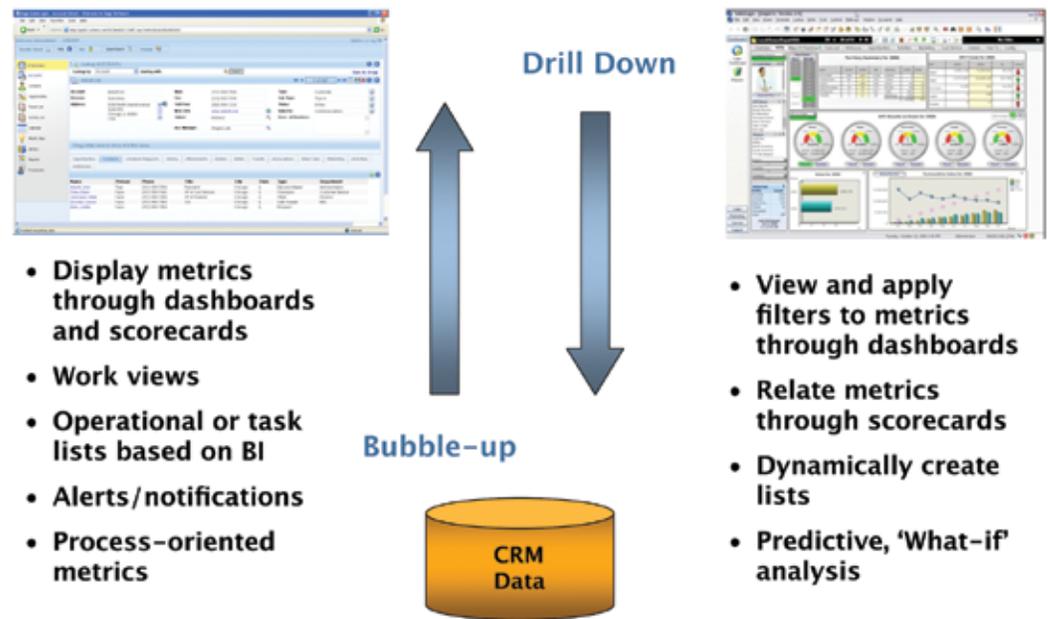


Figure 3: Present key information and provide fast, flexible, drill-down capabilities.

Further productivity will be gained by embedding business intelligence into existing processes and workflow. By embedding knowledge about key customers, customer service representatives will be aware of the client value in real-time and be directed to take steps appropriate for that customer—immediately and transparently. This allows customer service representatives to provide excellent levels of service to all customers, while delivering additional service and options to your most valuable customers. Sage Software is committed to meeting the requirements and scenarios outlined through the continued development and inclusion of sophisticated analytics.

Data quality is critical to maintain confidence in a CRM solution. Sage Software’s vision is to deliver built-in, yet customizable business rules that help users to enter data faster and with higher quality. We believe that CRM solutions must automatically complete certain entries based on the task context and other already captured information. Sage Software envisions utilities and tools that scan data to find inconsistencies and/or missing

information. From an easy-to-use interface, the team or person responsible for the data must be prompted to enter or correct the information. Sage Software believes that CRM solutions must support built-in capabilities to automatically execute processes to assure data quality when importing bulk data such as leads from a purchased mailing list. The system should optionally suspend the import until the data is reconciled or complete it and generate a log for later review and correction.

In addition, data quality must continue to be enhanced by a range of reputable partners. Sage Software envisions turnkey support and integration with external data cleansing services. In this way, Sage SalesLogix will quickly and efficiently enable external services to securely peruse, condition, and augment your data with up-to-date information—providing simple reports on the data that has been modified or identified as candidates for further review.

## Works the Way I Do

### Current Market and Opportunities

The ultimate test of a CRM system is user adoption. CRM usability has improved considerably, as has user adoption. Still, more broad-based adoption and enhanced productivity can only be achieved with systems that exactly match existing work process and personal work style. While all CRM systems have the ability to configure or customize the layouts and workflows, these customizations are either very simplistic or so complex as to require manual form creation and scripting. The complex customizations are very high value and result in CRM systems that fit tightly within the company. The problem with complex customizations is the time and expertise to create them and the ability for such customizations to carry forward during upgrades. Many times the user would like a relatively simple change, though the effort and resulting cost make such changes prohibitive.

As users enter data into the system they desire for it to be personally useful. For example, sales people report a common problem that once an opportunity is entered in the system their manager quickly sees the new entry and is asking questions long before the sales representative is ready. As a result, users often keep data outside of the CRM system or purposely understate opportunities to keep them “under the radar” until they are ready.

Another area of challenge for users is the ability to have powerful search tools that help them quickly locate information of interest. A marketing representative may want to assess the history of a new lead that is from a company they already do business with. It is important to determine if the inquiry is related to an existing sale or if it is a completely new opportunity. The ability to easily adapt the system to unique work styles through simple, yet effective, customization is an area where CRM systems can provide more value.

### Sage SalesLogix Today

Sage SalesLogix delivers high usability features out of the box for Web, Windows, and mobile clients. However, the exceptional power in Sage SalesLogix is the extensive customization capabilities. Sage SalesLogix customers identify their unique business processes and model them within the product. This helps a customer take existing competitive differentiators, automate them, and make them repeatable across all users.

Customizations can be created using simple wizards that enable a comprehensive customization experience without writing code. Very advanced customizations can be coded to embed unique workflow and business processes deep into the application. While customers may take on the job of customizing themselves, quite often they rely on the extremely knowledgeable and experienced group of Sage SalesLogix business partners.

A differentiator for Sage SalesLogix is the ability to deliver a robust, customized experience across Windows, Web, and mobile deployments including BlackBerry and Windows Mobile (Pocket PC and Smartphone) devices. Other vendors have similar platform coverage though often lack device coverage, have inconsistent features, or vastly reduced customization capabilities on one or more platforms. Sage SalesLogix delivers relevant and consistent functionality across all platforms when the users have network connectivity and when they are disconnected.

*While all CRM systems have the ability to configure or customize the layouts and workflows, these customizations are either very simplistic or so complex as to require manual form creation and scripting.*

The deep customization capabilities of Sage SalesLogix, supported by the advanced Application Architect, enable customizations to be made quickly and for multiple client types from a single environment.

### Rich User Experience



- Windows, Web, and mobile
- Advanced support for PDAs, Smart Phones, and BlackBerry
- Complete data access – even while disconnected

### Tailored Solutions that Grow as You Do



- Easy to use, codeless customization speeds and simplifies "custom fit" solutions
  - Self customization
  - Sage Business Partners
- Easy bundling of customizations promote easy and rapid distribution



Figure 4: Sage SalesLogix delivers a rich user experience and meets unique requirements.

The deep customization capabilities of Sage SalesLogix, supported by the advanced Application Architect, enable customizations to be made quickly and for multiple client types from a single environment. Deployment requires selecting the users with security rights to the customizations and they will automatically be deployed when those users connect to the database.

## Sage SalesLogix Vision

Sage SalesLogix is already the market leader in delivering easy to use and comprehensive customization capabilities across multiple platforms. We believe that to maximize long-term ROI from CRM investments organizations will require this same level of customization through entirely codeless, wizard-driven tools.

As a market leader, Sage Software understands customers want Sage SalesLogix to be the “center of work” where critical information required to perform at their best is easily available. New workplace style paradigms supported by additional customizations will further enhance usability. Sage SalesLogix will continue to provide the typical daily, weekly, and monthly view of tasks. However, to become the center of work our vision is to develop new ways to present information and proactively mine data to suggest “tasks” that need to be done. For example, when an important deadline, event, or milestone is coming up Sage SalesLogix will proactively identify the event and make this information apparent to the user. Further, e-mail and other communications will be sorted and organized according to user role. A sales representative may choose to have e-mail sorted according to stage in the pipeline, deal size, close date, etc. Sage SalesLogix will also make routine use of alerts to notify team members and management when pre-selected sales, marketing, or service parameters have changed.

Sage Software understands that an area of critical importance to CRM customers is managing unfinished work. Frequently, users find themselves interrupted during the course of the day. Despite great intentions, work is often left unfinished due to interruptions, and the user does not even realize until the end of the day, or maybe not at all that they never completed a particular task. Sage Software is continuing to advance Sage SalesLogix features so it can identify and manage in-progress work with helpful reminders.

## Be the Center of Work

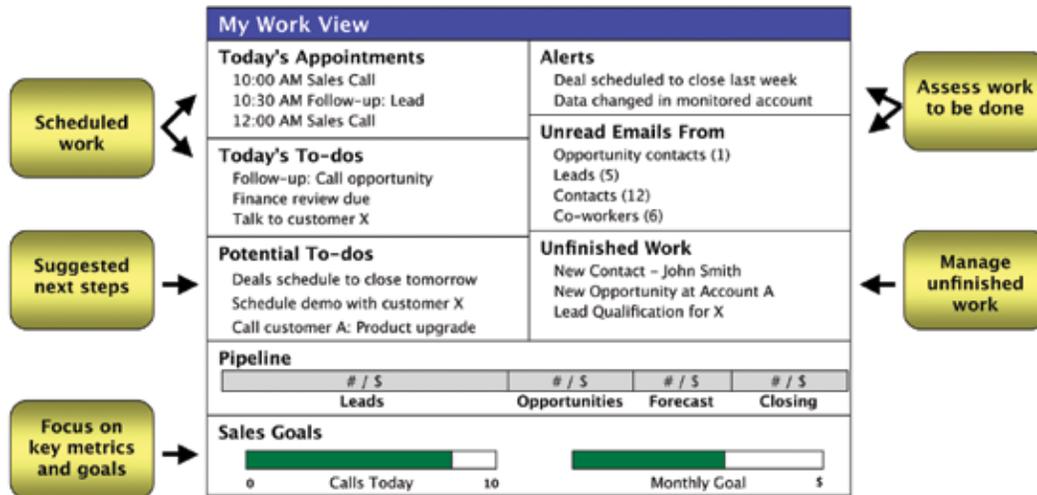


Figure 5: Enhanced user experience enables a highly productive and personalized work space.

Other examples of providing more beneficial and personalized insight include the ability to organize leads relative to profiles like spending patterns that fit certain growth profiles and sort leads by what one user entered versus others. Connecting intelligent analytics to existing marketing response information can yield deep insight into customers that are of the highest value and likelihood of closing.

Due to the comprehensive customization capabilities inherent in Sage SalesLogix, we encourage development of specific vertical solutions. Many Sage SalesLogix business partners already have expertise in particular industries. Working with existing and new partners, vertical solutions will take on a greater role in the Sage SalesLogix offering. These specialized products will yield highly productive industry-specific workflow and business processes that are easy to use and easy to deploy. These vertical packages may be implemented out of the box, or further tailored to meet even more specialized needs. These vertical solutions will be marketed within specific industries by knowledgeable partners that also offer additional complementary products and services. Sage SalesLogix allows business partners to isolate their own customizations from out-of-the-box business logic, enabling them to upgrade the application without rework or roll-out delays.

*Sage Software understands customers want Sage SalesLogix to be the "center of work" where critical information required to perform at their best is easily available.*

## Flexible Workforce

### Current Market and Opportunities

Today's modern workforce is constantly in touch and work is often completed in a variety of locations. Companies realize they need anytime, anywhere access to critical data from a range of devices. Consider the typical sales call. The sales representative needs to check information about existing support tickets to understand the customer mindset and satisfaction level prior to walking into a sales call. Once in front of the customer, questions may arise that require a check of available inventory, pricing, and delivery estimates for products of interest. Immediate access to this information is critical as it advances the selling process and demonstrates responsiveness. Making queries from a handheld device directly to the CRM system is required. After leaving the customer, the sales representative can promptly send a thank you e-mail from a mobile device. On the flight back she may choose to use her laptop to enter relevant details about the sales call, assign additional follow-up tasks to team members, and attach the latest product literature to a detailed follow-up e-mail to the customer—even while in a disconnected state. Once she is back at the home office she connects, all e-mails are sent, and information is updated so that teammates have the most relevant, timely information.

This client flexibility, supported in both connected and disconnected modes, affords users extensive flexibility of work style and location.

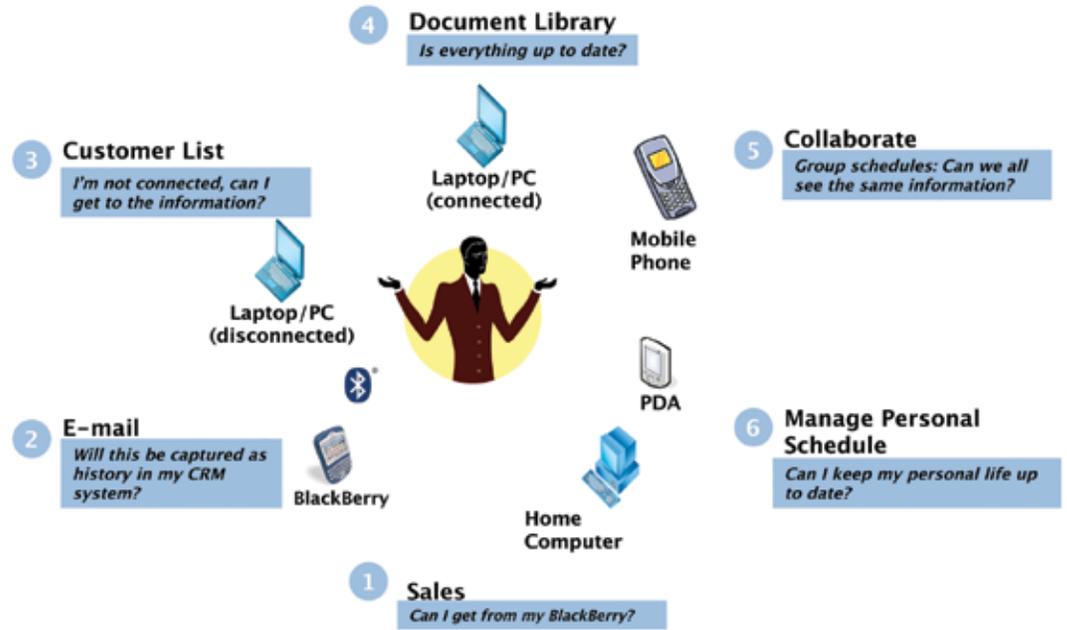


Figure 6: Today's mobile workforce requires solutions that work across multiple devices.

The challenge with this typical flow is it needs to be accomplished using a variety of devices, in various connected and disconnected states. When devices have different functionality, information is not transparently being logged to the CRM system, or if there is downtime when disconnected, productive workflow is seriously compromised. Users need all of these steps to occur quickly and easily, without duplicating data, so information is up to date and available to the entire team.

## Sage SalesLogix Today

Sage SalesLogix today offers a rich set of client access options including Windows, Web, BlackBerry and Windows Mobile clients. Several unique points of differentiation include:

- Disconnected/offline Windows client with full functionality
- Modern Web client with exceptional usability
- Common customization environment for mobile and Web platforms
- Full customization capabilities on BlackBerry and Windows Mobile devices
- Handheld devices fully support native UI and controls

This client flexibility, supported in both connected and disconnected modes, affords users extensive flexibility of work style and location. Users connected to the LAN in the office, disconnected remote users, connected remote users, and mobile users with handheld devices can all work productively and share critical sales, marketing, and support information. Comprehensive customization capabilities, including an easy-to-use and common customization environment for Web and mobile, make the user experience highly productive from any access method, which drives adoption. Customizations can be quickly accomplished using codeless tools, coded customizations using the included Application Architect for advanced work, or through commercially available software development environments.

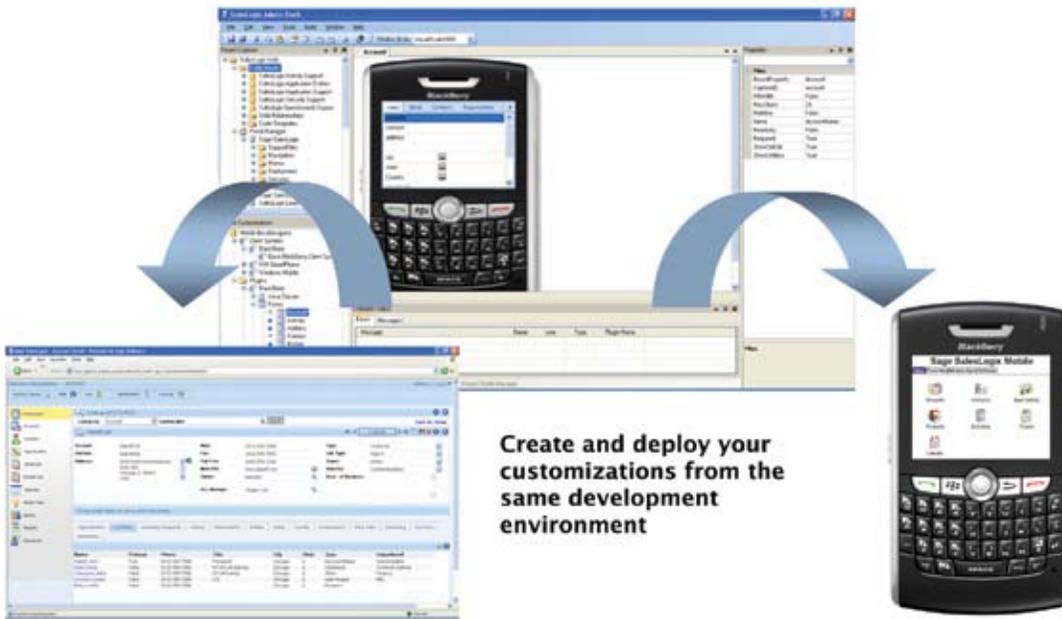


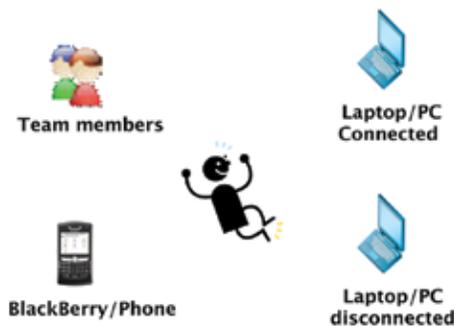
Figure 7: Sage SalesLogix provides a single environment for Web and mobile customizations.

### Sage SalesLogix Vision

Sage SalesLogix believes that pervasive technology will accelerate the evolution of the flexible workforce. This will require CRM vendors to fully support mobile workflow, whether users are connected or disconnected, across multiple client types. Our vision is to continue to enhance the Sage SalesLogix Application Architect to support a “write once, deploy to many” device paradigm to ease customizations for organizations using multiple clients. Further, we expect to enhance the use of common tools, shared customizations, intelligent rendering based on device capability, and approaches to automated deployment. Additional development of the codeless customization experience will enable customers to quickly make desired, high-value changes that can be immediately rolled out to all users. Imagine the productivity benefits if a key competitive advantage becomes available to your sales team. Rather than relying on e-mail to broadcast to the users, the system workflow is instantly modified to include a new step and all sales reps are using the new techniques within minutes to close even more sales.

*Our vision is to continue to enhance the Sage SalesLogix Application Architect to support a “write once, deploy to many” device paradigm to ease customizations for organizations using multiple clients.*

- **Reduce Cost**
  - Customization and deployment
  - Write once, deploy multiple
- **Eliminate Complexity**
  - Works the way a user expects
  - Seamless experience on multiple platforms
- **Increase Capability**
  - Location awareness



**“Your calendar is open. Would you like a list of clients in the area? Driving directions?”**

Figure 8: Sage SalesLogix Vision—Facilitating a flexible and highly mobile workforce.

Further enhancement to the user experience will come from leveraging location-aware technology within devices. Imagine finishing a sales call early and with a push of button your highest-value prospects or customers are listed in order of geographic proximity. Select one and driving directions are sent as a text message to your wireless phone or BlackBerry. After visiting the first customer, select another and repeat the experience. Integrating the location awareness of devices and business intimacy of Sage SalesLogix can simplify workflow in many additional sales and customer service scenarios.

## Systems without Borders

### Current Market and Opportunities

Since the CRM system is the hub of customer interaction, it's critical that the CRM system connects with other systems such as ERP, manufacturing, partner and supplier systems, company Web sites, and a range of Internet services. The most common integrations today are between CRM systems (front office) and ERP systems (back office). This critical linkage bridges CRM users with another critical internal team—accounting—to ensure consistent pricing, quotes, orders, and inventory information is current and up to date.

Typically, CRM and ERP systems are linked together via customized programming or pre-packaged connectors. The systems typically exchange data via batch jobs, sharing and updating information about accounts, orders, quotes, etc. These integrations are often fragile and break when one of the systems is upgraded. Multi-step processes and cross-application workflow is very challenging as the systems typically are not prepared to deal with sequential events and dependencies. Further, data in one system is often viewed in the other as screens pops. This is typically out of context to the requesting user and presents an unfamiliar interface often with more information than necessary. Creating integrations between CRM systems and multiple back office systems adds even more complexity to keep the systems in lock step with one another.

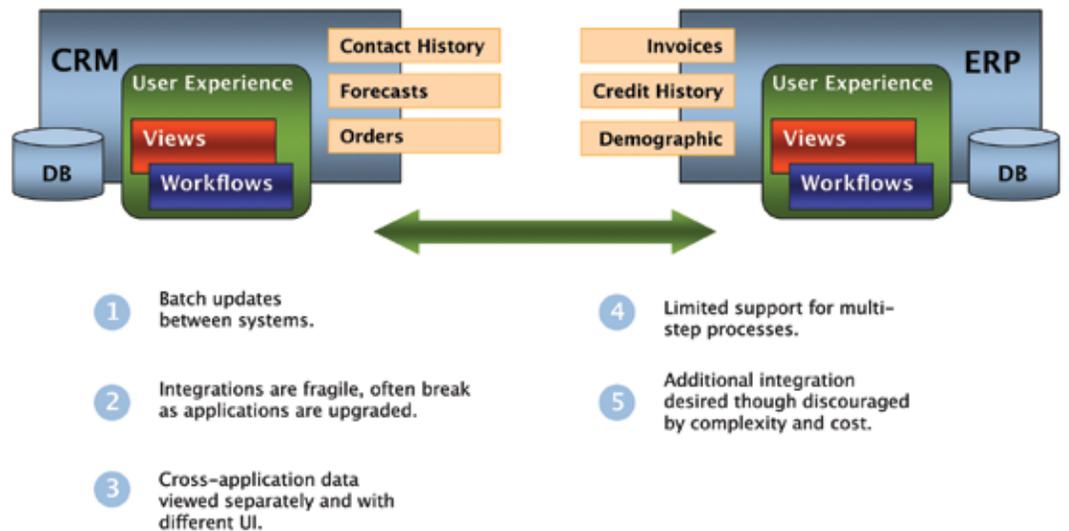


Figure 9: Today's integrations are complex with limited usability and cross application workflows.

## Sage SalesLogix Today

Sage SalesLogix supports a range of integrations with ERP systems. Most notably, turnkey integration is available for several Sage ERP solutions found in multiple countries including:

- Sage MAS 90, MAS 200, and MAS 500
- Sage MMS
- Sage Line 500
- Sage ClassicLine
- Sage Ligne 100
- Sage Integrale

## Sage ERP Integration

- **User experience 100% in Sage SalesLogix**
- **Cross application workflow**
  - **Create and submit order with approval**
  - **Manage products**
- **Common data interlock**
- **Ad-Hoc ERP query through Sage SalesLogix UI**
- **Turnkey, packaged, customizable**

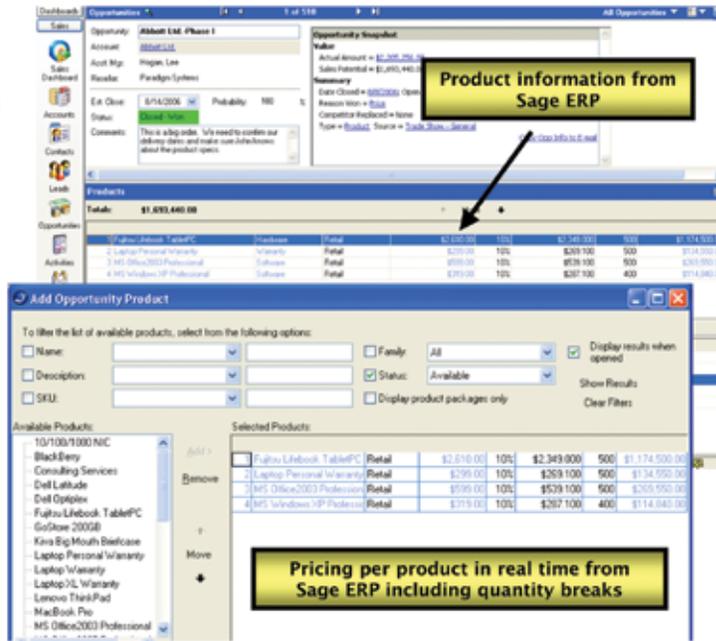


Figure 10: Sage SalesLogix provides seamless integration with Sage MAS 90, MAS 200, and MAS 500.

These integrations facilitate data exchange between the applications and present the information to the Sage SalesLogix user in the familiar Sage SalesLogix experience. Sage SalesLogix has also been integrated with back office systems from a range of other products by Sage business partners.

Turnkey integrations with leading eMarketing providers make campaign management fast and easy. When an e-mail campaign is sent, reader open rates, click-through rates, and opt-outs are annotated in Sage SalesLogix<sup>1</sup>. Further integrations are enabled due to the deep customization capability. For example, rapid connections to Internet services like data bureaus, e-commerce, lead sources, and data cleansing services are easily integrated.

## Sage SalesLogix Vision

Moving forward, the Sage SalesLogix focus is turnkey, easily customizable, and robust integrations with relevant Sage Software and other ERP products and assuring readiness to meet additional integration requirements. These integrations will have out-of-the-box functionality and be further customized to meet additional specialized needs. Sage SalesLogix will ship with interfaces for common operations that require information from the ERP

*Moving forward, the Sage SalesLogix focus is turnkey, easily customizable, and robust integrations with relevant Sage Software and other ERP products and assuring readiness to meet additional integration requirements.*

<sup>1</sup> This feature is only available in North America and the United Kingdom.

system such as pricing, quotes, orders, inventory, credit history, and more. These integrations will support cross application workflow and fully respect the security settings of both applications. Additional interfaces will focus on eMarketing, eCommerce, and data quality. Such interfaces will enable highly usable presentation of information that can be further customized as necessary. Relevant information will be available on the device that best fits any given user. For example, a sales representative will be able to query the status of an order, or available inventory from their handheld device with real-time feedback while at a client's site.

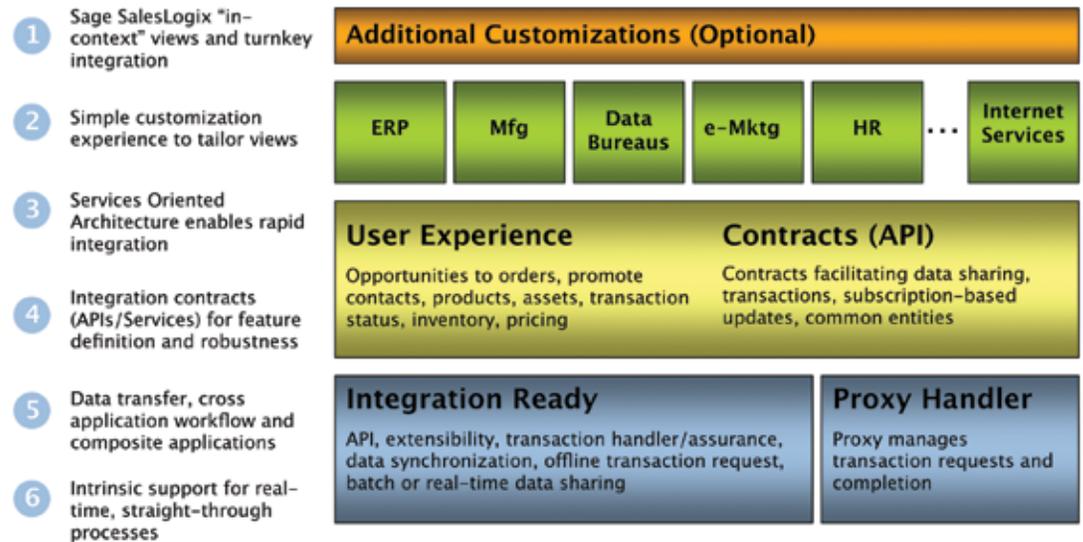


Figure 11: Turnkey integration between Sage SalesLogix and a range of applications.

The separation of business logic from presentation, and exposure as services, makes it easy to interface Sage SalesLogix with other systems independent of physical location. Support for integration contracts via third-party applications and Web services will make additional integration efforts straightforward and reliable. The extensive customization capabilities of Sage SalesLogix coupled with a modern architecture make it a natural choice for integration with various in-house, external, and Internet services. For example, within a matter of minutes Sage SalesLogix can be connected to an RSS feed with highly personalized interfaces that show news items, location relevant status such weather and other items for any selected account—providing relevant and up-to-date information when speaking to a client or prospect.

## Systems I Can Afford and Manage

### Current Market and Opportunities

A CRM system needs to balance the productivity needs of the users, the manageability and TCO concerns of IT, and the financial returns required by C-level executives. There are several models in place today that span hosted, on-premises, and in some cases hybrid approaches. Each has its advantages and limitations and selecting the appropriate model is dependent on many factors including integration with other systems, in-house expertise, complexity of need, and financial resources. In all cases most concerns center on the cost and complexity of implementing a system. Some CRM vendors with SaaS claim instant on/off capabilities with no costs to get up and running. Quite frequently, organizations subsequently experience very high costs when they need to customize the solution, integrate with other systems, require additional storage, etc.

Should customers choose to end the service with a SaaS CRM vendor, it's important to know if there are on-premise versions available and to understand how useful their returned data will be as they move to another solution. Other vendors portray their systems as simple additions to existing IT stacks. However, these systems often require additional dedicated servers and other technologies that effectively lock customers in to a particular technology stack. Most customers have a blend of technologies from various vendors and need flexible CRM solutions that can be interfaced and integrated with existing technology and applications from multiple vendors.

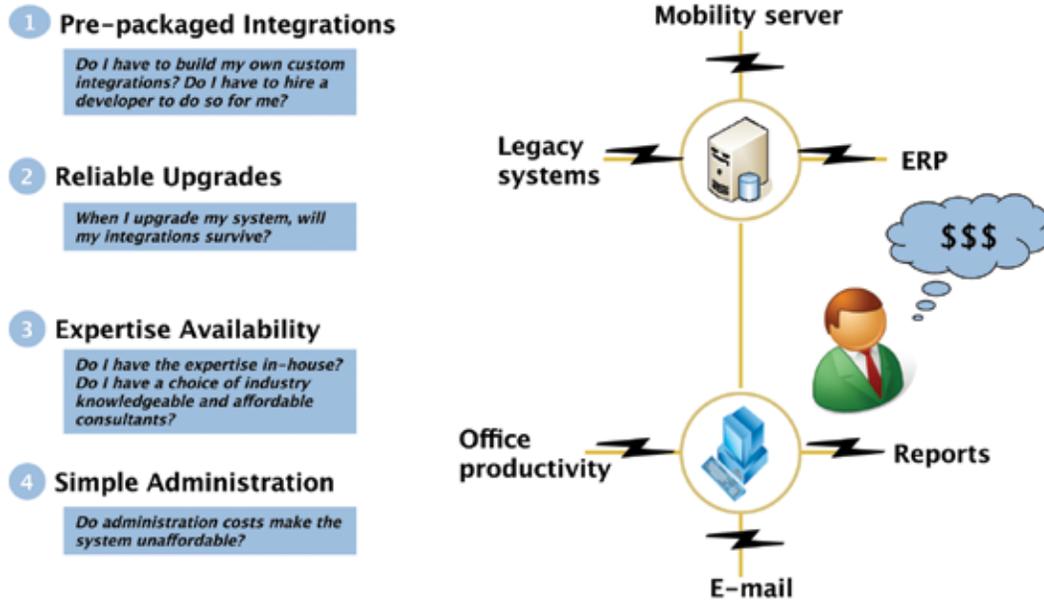


Figure 12: CRM systems can be challenging to integrate, manage, administrate, and upgrade.

Customers need to work with local partners that understand their business, existing infrastructure, and objectives for CRM. All too often vendors of CRM systems oversell the simplicity and benefits of their systems. Reliable and trusted partners are needed to thoroughly assess customer needs to determine the ideal mix of off-the-shelf software, customizations, and integrations with other systems to deliver a highly effective CRM solution.

### Sage SalesLogix Today

Sage SalesLogix delivers rich out-of-the-box functionality and is supported by the deepest and most experienced group of business partners in the industry. Many Sage SalesLogix customers are organizations or companies that have specific and unique business processes they desire to capture and automate in their CRM system such as a selling strategy, workflows, or integration requirements. The modern architecture of Sage SalesLogix enables fast and easy deployment of these highly unique business processes to Windows, Web, and mobile device users. The services-oriented architecture and ongoing refinements to further separate business logic and workflow simplify migrations, upgrades, and integration with other systems. Windows, Web, and mobile users transparently access and share data that is relevant for their role. A single Application Architect brings together Web and mobile customizations in a common environment that saves time, effort, and money. Advanced customizations are quickly created and often are accomplished with easy-to-use, yet powerful codeless tools. Customers have the choice of using the provided tools or in-house tools and skills of .Net developers. Customers can develop and deploy a highly customized CRM solution themselves or choose to work with one of our many highly skilled business partners.

*Most customers have a blend of technologies from various vendors and need flexible CRM solutions that can be interfaced and integrated with existing technology and applications from multiple vendors.*

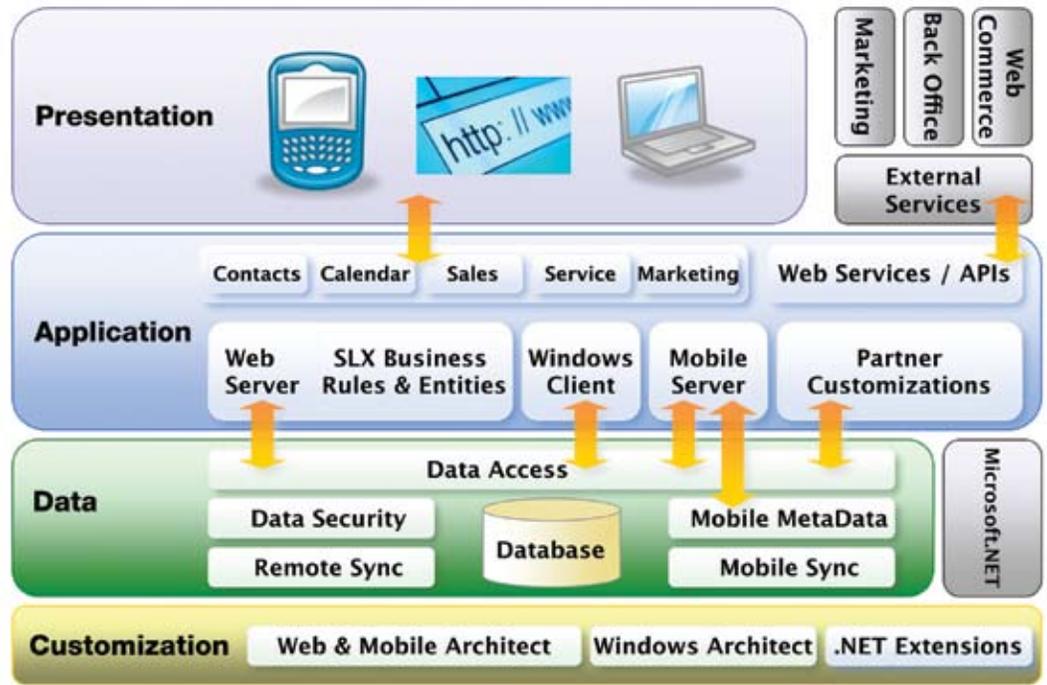
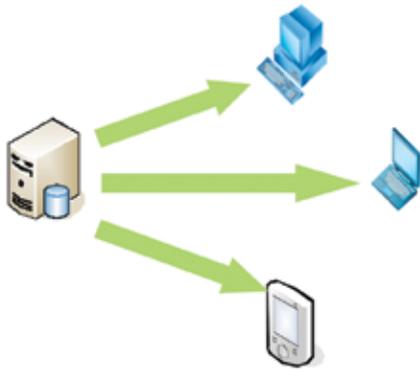


Figure 13: Sage SalesLogix has an advanced architecture based on industry standards.

### Sage SalesLogix Vision

To maximize the value and ROI of Sage SalesLogix, Sage Software will continue to enhance the development of its “write once, deploy to many” environment. The Application Architect will be enhanced to enable customizations to be created once and seamlessly deployed to Windows, Web, or mobile devices. Device capabilities and rendering of the presentation will be automatically managed by Sage SalesLogix. The architecture will evolve to further isolate the business logic from the presentation layer. This will provide assurance that upgrades will be pain free, even in highly customized deployments. Further, customers can add unique customizations of their own on top of those provided by their business partners with full isolation to enable clear and simple upgrades and maintenance. A CRM system should have graphical tools to show a comprehensive view of the status of all client types, which makes it easy for administrators to know when a user is having trouble connecting to the system and take quick corrective action. Sage Software plans advancements in graphical administration to manage the multi-client environment. Sage Software is also committed to continuous usability improvements, greater individual personalization, new functionality, and expanded device support delivered in an easy to afford and manage way.

**1 Write once, deploy many – simple upgrades and rapid deployments**



**2 Graphical management/administration, including remote users**

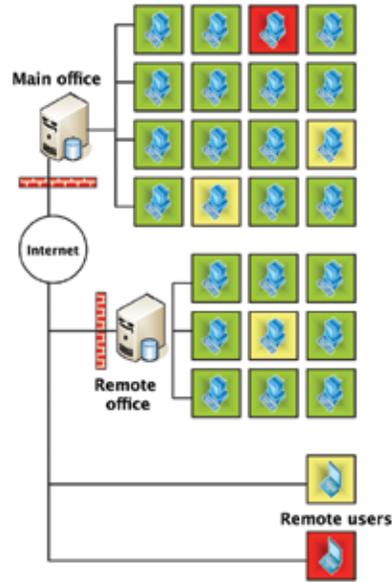


Figure 14: “Write once, deploy to many” capabilities and graphical administrative tools simplify deployment.

## Multi-Year Roadmap

The following is a high level summary of planned enhancements that span several phases and multiple releases. Many of the enhancements have been described and discussed in each of the “Sage SalesLogix Vision” sections of this paper.

	2007/2008	2009+	
Customer and Business Insight	<ul style="list-style-type: none"> <li>• Lead and Defects</li> <li>• SFA, Mktg and S&amp;S Suite Expansion</li> <li>• Ad-hoc, Visual Analysis</li> </ul>	<ul style="list-style-type: none"> <li>• BI driven processes</li> <li>• Scorecards</li> <li>• Enhanced Data Maintenance Automation</li> </ul>	<ul style="list-style-type: none"> <li>• Full Customer Lifecycle support across Suite</li> <li>• Assisted What-if analysis using predictive models</li> </ul>
Systems that Work the Way I Do	<ul style="list-style-type: none"> <li>• Recommended Next Steps</li> <li>• Team &amp; Personal process automation</li> <li>• Manage unfinished work</li> </ul>	<ul style="list-style-type: none"> <li>• Seamless Office Integration with CRM data and activities</li> <li>• Task Oriented Workspaces</li> </ul>	<ul style="list-style-type: none"> <li>• Personalized Workflow</li> <li>• Team collaboration driven process automation</li> </ul>
Enable a Flexible Workforce	<ul style="list-style-type: none"> <li>• Mobile Actions based on Context</li> <li>• Location Aware UI</li> </ul>	<ul style="list-style-type: none"> <li>• No-touch, disconnected Client</li> <li>• Additional Mobility Device Support</li> </ul>	<ul style="list-style-type: none"> <li>• Remote Office Rollup</li> <li>• One Click deploy for Remote Office</li> <li>• Dispatch and resource scheduling</li> </ul>
Systems Without Borders	<ul style="list-style-type: none"> <li>• Prepackaged Views</li> <li>• CRM/ERP Contracts</li> <li>• Cross Application Workflow</li> </ul>	<ul style="list-style-type: none"> <li>• e-Service Integration across multiple vendors</li> <li>• e-Marketing referrals &amp; surveys</li> </ul>	<ul style="list-style-type: none"> <li>• Closed loop feedback</li> <li>• Pay as you go services</li> <li>• Composite Applications and standards (BEPL)</li> </ul>
Systems I can Afford and Manage	<ul style="list-style-type: none"> <li>• Legacy ActiveForm Migration tools</li> <li>• Turnkey Upgrades</li> <li>• One click deployments</li> </ul>	<ul style="list-style-type: none"> <li>• BI wizard driven customizations</li> <li>• Web-based Administration</li> <li>• Write once for Windows &amp; Web</li> </ul>	<ul style="list-style-type: none"> <li>• Web-based Application Architect</li> <li>• Write once for Mobile, Win &amp; Web</li> </ul>

\*\*\* Information is subject to change without notice \*\*\*

Figure 15: Sage SalesLogix multi-year roadmap focuses on the five core areas of CRM.

## Summary

This paper outlined and discussed the five core areas for a successful CRM implementation. It covered the existing market, Sage SalesLogix today, and provided a glimpse of our plans for the future. Sage SalesLogix delivers exceptional value today and has clear leadership in the areas discussed. For customers that value a CRM solution that fully captures the uniqueness of their business, require high flexibility, and deep integration, Sage SalesLogix is a clear choice. As a Sage SalesLogix customer you can expect immediate productivity and a rapid return on your investment. Sage Software will continue to add new functionality, more multi-client capabilities, mobility, analytics, unparalleled customization capabilities, and support of connected and disconnected clients to Sage SalesLogix. Continued development in these areas will enable Sage SalesLogix to further expand its base of more than 8,500 customers and 300,000 users worldwide. Lastly, Sage Software, which has more than 5.2 million customers worldwide, has a strong commitment to Sage SalesLogix. With the backing of a tenured company such as Sage Software, Sage SalesLogix customers are provided with the support, services, and programs they need to ensure their success.

Sage Software looks forward to an exciting future for Sage SalesLogix and invites you to be a part of it. For additional information, please contact your local Sage SalesLogix business partner or visit our Web site at [www.sagecrmsolutions.com/saleslogix](http://www.sagecrmsolutions.com/saleslogix).





*Your business in mind.*

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