

**Volume 3
Issue 4
April 2006**

What's Inside

Page Two

New SalesLogix Marketing Feature Pack CONTINUED

Page Three

New SalesLogix Marketing Feature Pack CONTINUED

Headline News CONTINUED

Page Four

What's New
Upcoming Events
Meet Our Experts

Headline News

Sage SalesLogix CRM ranked first in its category in the annual **CRM Leader Awards** sponsored by *CRM Magazine*. In the SMB (small and mid-sized business) Suite CRM category, SalesLogix beat competitors Microsoft, Net-Suite, Onyx, and Salesforce.com.

Continued on Page 3

New Sage SalesLogix Marketing Feature Pack

Sage Software plans the release of a new Marketing Feature Pack for Sage SalesLogix CRM in late October, 2005. The Sage SalesLogix Marketing features are fully integrated to take advantage of existing Contacts, Accounts, Opportunities, Mail Merge, Library Processes, and Reporting capabilities.

The new SalesLogix Marketing Feature Pack includes new and enhanced features including a new Leads Database, Campaign Management, and Email Marketing. In this article we'll preview the changes, and show you how you can put them to work.

New Lead Database

Lead Database

With the release of the new SalesLogix Marketing Feature Pack a new **Leads Database** is added. Leads will be a simple staging area where raw lead data is added to SalesLogix without compromising the quality of the existing Contact and Account data. A substantial number of leads never become customers, therefore it makes sense to keep lead data in a separate database until they are qualified.

The new SalesLogix Marketing Feature Pack adds the ability to record, track, manage, and promote individual Leads. Leads are a Main View, using a separate user interface and a separate table from your Accounts and Contacts. This keeps unqualified Leads separate from your main databases of Customers and Accounts.

Lead Capture And List Import

Many of your Leads may come to you from your company's Web site. The new SalesLogix Marketing features include a clean, simple Web response form that encourages potential customers to send you their information—information that is later transferred and imported into SalesLogix. The form does not rely on the SalesLogix Web Host and can be hosted in a remote location.

Another common source of leads are lists from trade shows or purchased database lists.

Typically these lists are in CSV (comma separated value) format and contain basic prospective customer information.

SalesLogix Marketing module includes an easy-to-use Lead import tool allowing you to import lists into the Lead database. This is not the Import Wizard, but rather a new tool designed for non-technical users. Common SalesLogix fields, shown in a simplified list, eliminate the need to understand the SalesLogix database schema. If you need more powerful import functionality, you can use the SalesLogix Architect to customize the import to your exact specifications. The import tool will handle most delimited files, including tab-delimited or comma-delimited files, and will import into the Lead database only.



The qualification checklist in the SalesLogix Marketing module makes qualifying leads faster and easier.

Continued on Page 2

SimpleSoft Solutions

See page 4 for more info!

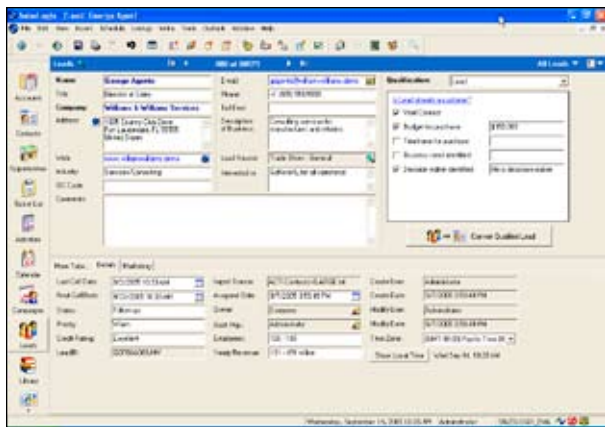
Compliments of:



SIMPLESOFT
Solutions, Inc.

Qualifying Leads

When is a lead worth converting into an Account or Contact? This process of qualifying leads is handled in a very straightforward fashion



The new Leads Data Entry screen is streamlined and utilizes check boxes to speed data entry.

within the new SalesLogix Marketing Feature Pack. The interface is streamlined and promotes fast data entry by your telemarketing or sales team.

In a typical organization, lead qualification is handled by individuals who are often paid based on the number of leads they qualify. Calls are brief, and the individuals verify information, ask scripted questions, check response boxes, and make basic notes in free form comment fields. Therefore, a Lead record consists of basic contact information and just the necessary details to determine if that lead qualifies as a sales opportunity.

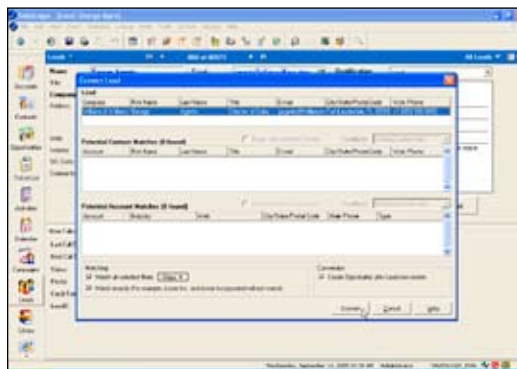
Typically there are just a few questions that determine whether a lead is worth moving into the sales process. Each company is unique; you determine the questions that best suit your company's goals. The questions are then included on the Leads data entry screen. By simply marking a check box with the answer, the lead qualifier records the answers to these questions in the Lead database, thus allowing you to decide whether or not to promote a Lead to Account or Contact status.

Lead Management

Once the Lead data is verified and qualified, you can easily convert the Lead to a new Contact or an Account, or merge the lead with an existing Contact or Account.

To convert a Lead simply click on the **Con-**

vert Qualified Lead button and a new window guides you through the conversion process. You'll provide some filters for SalesLogix to use as it searches Accounts and Contacts for potential matches. For example, you can require an exact match that would see Acme, Inc. and Acme Incorporated as separate Accounts. Based on your filters, the program will identify potential Contact matches. You can elect to merge the Lead with an existing Contact and specify which record *wins* in the event of conflicts such as varying telephone or email address information. The program will also search for potential Account matches for your Lead, and will allow you to add the Lead as a Contact to an existing Account if desired. You can optionally create an Opportunity for the Contact during the conversion.



Quickly convert a Lead into a new Contact or merge it with an existing Contact.

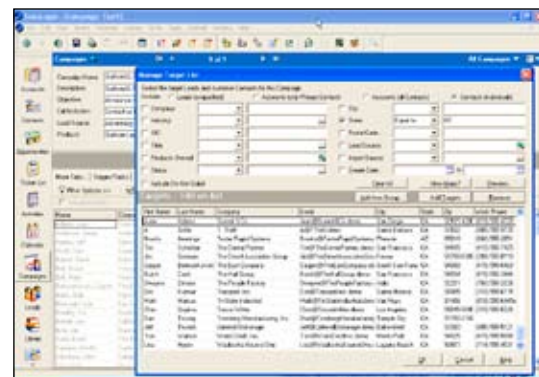
Campaign Management

Targeting Your Campaign

Fundamental to the overall success of your campaign is determining to whom your campaigns are directed. It can be expensive to market, so the ability to narrow down your overall list to a suitable list of targets that fits your budget and your objective is vital.

You need a way to get your list of leads out easily and to add them to your campaign. This process of selecting and refining your list of targets shouldn't require a great deal of technical expertise, and with the new SalesLogix Marketing Feature Pack, it doesn't. A new selection interface allows you to select, based on a wide variety of selection criteria, from your Leads,

Accounts, and Contacts databases. For example, using simple check boxes and qualifiers, you can



Target the Leads, Accounts, and Contacts most appropriate for your campaign.

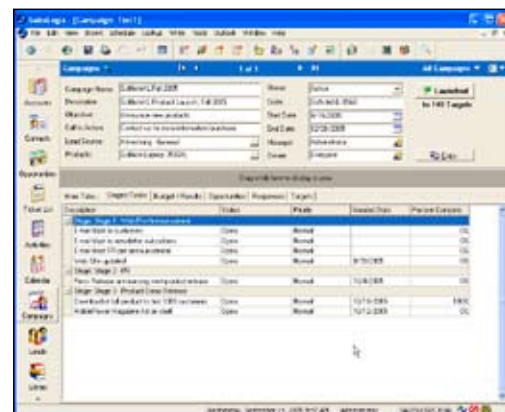
find all Accounts in California who own a particular product and are in a particular industry. You also can select various Groups of Leads or Contacts to add to your target list.

The **Target List Selection** screen keeps a running tally of how many targets have been selected, and allows you to add or remove individual targets easily.

Managing Campaigns

Well designed, organized, and executed campaigns are the goal of every marketing departments. In the new SalesLogix Marketing Feature Pack, several new features are added that will help make that goal a reality.

Campaigns are now a Main View, instead of a dialog box, meaning you can easily switch back and forth to other tasks within SalesLogix without closing the Campaigns view. Setting up a new campaign is easier than ever before. If you choose, you can copy portions of an exist-



Easily track a campaign's status through the new Campaign Main View.

ing campaign to help create a new campaign.

A campaign can include multiple lead sources and multiple products as the focus of the campaign. You define the stages and the tasks you wish to track for each campaign. For each task SalesLogix will track extensive information such as: Priority, Task Cost, Task Hours, Percent Complete, Completed Date, and even free form comments. You can assign a task to any SalesLogix user or to an external source.

Your existing campaign data will be converted to the new campaign structure during installation of the SalesLogix Marketing Feature Pack.

Campaign Reporting

Viewing and analyzing the results of your campaign is a crucial tool in determining the success of your campaign and where your future marketing dollars will be spent. To allow you to easily assess the status of your campaigns, a tab will display Budget, Costs, Response, and Resulting Opportunities of each campaign.

Budget				Response			
	Budget	Actual	Variance		Target	Actual	Variance
Total Cost	1980.00	1932.25	47.75	Contact Response Qtr	1.0%	27	24
Response	0.00	177.21	177.21	Contact Response Rate	90.00%	1.97%	8.22%
Calculated Cost	1980.00	1762.44	217.56	Request Response Qtr	1.0%	27	24
Target Cost	1980.00	1762.44	217.56	Request Response Rate	100.00%	1.97%	8.22%

Cost Metrics				Opportunities				
	Target	Actual	Variance		%	Delta	Qty	
Cost / Target	1.98	1.09	0.89	Open Potential	0.00	Response to Open	0.7%	2
Cost / Response	393.333	289.748	103.585	Open Weighted	0.00	Open Opportunities	0.00%	0
Cost / Opp	900.000	894.345	55.655	Actual Won	1700.00	Opportunities Won	130.00%	3
Cost / Sale	900.000	894.270	55.730	Actual Lost	0.00	Opportunities Lost	0.00%	0

Effectively analyze all aspects of your campaign using key metrics.

Key campaign reports are included as well, providing metrics such as: the cost of the campaign versus its budget, the cost per lead, and the return on investment of the campaign—relating campaign cost to the actual opportunities won.

Email Marketing

Email marketing is rapidly gaining recognition as an effective and inexpensive way to reach a large audience. SalesLogix Marketing now includes an effective set of tools that allow you to take immediate advantage of this convenient communications method. Online surveys are another popular marketing tool, allowing you to gather a large volume of valuable feedback from your audience quickly and inexpensively.

EmPulse

Sage Software teamed with EmPulse to create a new service providing Web-based marketing tools including mass email campaigns and on-line surveys. The service, available to SalesLogix customers, is called **EmPulse**. It includes all the

tools you need to get your email campaign or survey going. The EmPulse features help you create effective email campaigns and surveys that drive higher response rates.

The process is simple. From within SalesLogix you'll export a list or Groups of Leads and Contacts. EmPulse will automatically import your email list directly from your SalesLogix solution. Responses are automatically transferred into SalesLogix along with the click-through information.

A large template library allows you to choose a predefined template saving time and ensuring a professional look. Customize these templates, or start from scratch and design your own. You can upload images and files to truly customize your message. You don't have to know HTML to create professional looking messages; EmPulse uses a drag and drop editor, and what you see on screen is exactly how your message will appear. Email messages sent by

EmPulse can be personalized with your recipients' name and other information.

Real-time reports allow you to perform comprehensive analysis on your campaigns with bar, column, and pie charts and convenient data exports to screen, Excel, or .TXT files.

You can design Web surveys to query Leads and Contacts and uncover valuable information. EmPulse's Web surveys allow you to add your own company logo to the survey. The surveys support three question types and have an option for required answers. Note that while you'll have access to your survey results, these results are not imported into SalesLogix at this time.

Excellent list and address management handling will catch duplicate email addresses, manage recipients' unsubscribe requests, and retry and track bounced messages.

EmPulse incorporates email marketing best practices to help ensure your campaign is in compliance with anti-SPAM laws.

Your SalesLogix remote users will synchronize outgoing email campaigns and all incoming responses as part of the standard SalesLogix synchronization process. No other Internet access or firewall settings are required.

EmPulse is a Web service. It does not re-

quire a separate server; a simple Windows service is installed on your SalesLogix server to communicate with EmPulse. Data transfer between SalesLogix and EmPulse uses SSL (Secure Sockets Layer).

Charges by the volume of emails delivered, and special pricing is offered to SalesLogix users. Call us for details of how to subscribe to this service.

How To Get It

The new SalesLogix Marketing Feature Pack is available to all SalesLogix v6.2 customers with a current Maintenance Contract or new SalesLogix customers at no additional charge. SalesLogix Service Pack 3 or later is required.

Other Notes

With this release the former Campaign functionality is replaced by the Marketing Feature Pack. However, the former Campaign data will still be available. In the initial release, some third-party add-ons and customizations may not work with the new Marketing functionality. Call us with any questions. ☆

Headline News

Continued from Page 1

Nucleus Research and *CIO Decisions Magazine* selected Sage SalesLogix CRM customer Big River Telephone Company as a **2005 Technology ROI Award** winner. The awards honor ten IT solution deployments that have produced positive bottom-line financial and business results. Big River Telephone achieved a 1,139 percent return on investment by implementing SalesLogix. The implementation also helped Big River achieve a 98.6 percent customer satisfaction rating, exceeding the 70 percent telecommunications industry average.

Nucleus Research analysts worked with CIO Decisions editors and independent CIOs to evaluate each organization's technological response to business requirements. Nucleus Research measured each implementation's ROI using a consistent methodology on which it has based thousands of ROI assessments worldwide. Costs and associated benefits produced metrics representing Big River's ROI over a three-year period. ☆

What's New:



Simplesoft Solutions breaks the Top 20 list of business partners in North America for the month of December.

Adequately plan for retirement of older versions of SalesLogix using the following dates:

SalesLogix v6.0—retires May 1, 2006

SalesLogix v5.2—retires January 1, 2007

SalesLogix v6.1—retires March 1, 2007

If you need help with the Marketing Feature Pack (Service Pack 3 upgrade) please call Simplesoft Solutions support at (937) 885-1204 or e-mail us at support@simplesoft.net.

Releasing the Leadership Potential in You and Teaming for Results has been added to our interpersonal skills training which also includes Professional Customer Service and Selling Inside Out. For more information call (937) 885-1204 and ask for Janetta Ross.

Upcoming Events:



"System Administration for SalesLogix" being held in Dayton at Sinclair College, May 1–3. The 3-day course cost is \$1,549.

"SalesLogix Getting Started with Development" is also being offered on May 4 at Sinclair College. The cost of this one day seminar is \$649.

Call today for a complete agenda on these courses or to register for both classes at (937)885-1204. Minimum enrollment is required to conduct courses.

Meet Our Experts:



Paul Hansford, senior consultant with Simplesoft Solutions has 12 years of software system experience and 9 of those years working with SalesLogix. He is a Microsoft Certified System Engineer (MCSE), and a Computer Science graduate of Mount Union College. Paul has been with Simplesoft Solutions for 6 years.

Paul has a passion for learning and he puts his skills to good use on the job and in his personal life. Paul is president of HUG which is a local home school support group designed to help parents who are educating at home. Paul and his wife, Carolyn, have 4 children.

At Simplesoft Solutions, Paul is our lead technical trainer for courses in system administration of SalesLogix. Paul splits his time at Simplesoft Solutions on technical support to our clients using SalesLogix, system implementation, and training system administrators of SalesLogix. He loves listening to and sharing ideas with customers who have a vision for how SalesLogix will improve their business processes.



SimpleSoft Solutions, Inc.

10851 Yankee Street
Dayton, OH 45458
(937) 885-1084
(937) 885-3580 fax

Chicago Office
26 North Old Rand Road
Lake Zurich, IL 60047
(847) 550-1243
(847) 550-1265 fax

Email: sales@simplesoft.net
Website: www.simplesoft.net

Customer Profile



Staco Energy is a manufacturer of voltage control, power quality, and voltage testing products. Their power solutions are used in a wide range of industries so targeting their marketing and sales dollars is critical for growth. Kim White, Marketing Coordinator at Staco, has been using the marketing capabilities of SalesLogix since the beginning and was thrilled with the enhancements available with Service Pack 3.

"The ability to enter and manage leads separate from the main database is keeping our database from getting junked up," reports Kim. "It will also allow me to more accurately determine conversion rate of leads to customers (leads to sales)."