

A large, abstract graphic on the left side of the page. It features several overlapping shapes in various shades of green: a large dark green leaf-like shape at the top, a large light green circle below it, and several smaller circles and teardrop shapes in medium and light green. Thin white lines curve around the shapes.

# Sage E-marketing for Sage CRM

**Commercial FAQ for Business Partners**



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# What are the benefits for me as a business partner?

Don't delay! Now is the time to get on board with Sage E-marketing for Sage CRM



3 key reasons why:

1

Receive commission on your Sage E-marketing sales!



2

Sell more CRM licences by including Sage E-marketing as part of your value proposition



3

Increase 'stickiness' and build better relationships with existing customers



# What are the benefits for my customers?

## Unleash the power of Sage E-marketing for Sage CRM

- Over 90 attention-grabbing templates out-of-the-box
- Simple 3-step wizard for rapid execution
- Smart-sending features
- Automated drip marketing campaigns with campaign filtering at each drip stage\*
- Open, click and bounce rate tracking with auto-feed of metrics directly into Sage CRM
- Rapid creation of groups from segmented prospect and customer lists
- Integrated telesales follow-up

\*Drip marketing will be available in Sage CRM v7.1 SP1, Summer 2011



# What are the benefits for my customers?

- Provides easy-to-use functionality to enable users to execute high-quality e-marketing campaigns rapidly
- Comes with a wide range of editable e-marketing templates that can be easily customised to suit your business or campaign
- Includes options to create standard or automated drip e-marketing campaigns (anchor, calendar & duration), automatically delivering email communications to the right people at the right time for maximum impact
- Enables marketing users to market to and build on existing groups in Sage CRM
- Marketers can create new e-marketing campaigns or incorporate email blasts into current marketing activities
- Allows marketers to effectively segment their target lists based on results for future marketing campaigns
- Telesales calls list can be based on e-marketing responses, closing the loop between email and telesales
- Enables users to comprehensively track and analyse the effectiveness of email marketing campaigns within Sage CRM and easily calculate ROI

The screenshot displays the Sage CRM E-marketing interface. The main window is titled "New E-marketing Campaign, Step 3 of 3". It features a "Wave Activity" section with fields for "Wave Activity Name" (Newsletter - Dec 2010), "Status", "Start" (14/12/2010), "End" (15/12/2010), "Activity Budget" (€ 500.00), and "Actual Cost" (€). Below this is the "E-marketing E-mail" configuration area, including "Subject" (Click to win), "Send As" (davemontana), "Group" (e-marketing group), "Address From" (Company - Business E-mail: Comp\_EmailAddress), and a list of templates. A "Personal Message" field contains the text: "Read all about what's happening in Dec 2010 and be in with a chance to win a prize." Overlaid on the bottom right is a "Drip Campaign Stage" configuration window, which includes "Send on" (1 Days After 15/12/2010 at 14:30), "Send To" (All Contacts in Drip Marketing List), and "Notification" (Send on 1 days After stage is executed).

# How much does it cost and what is included in the base package?

## Base Pricing for bundle per month:

EURO	€114.95
USD\$	\$149.95
GBP	£99.95
AUD	149.95
NZD	199.95

## Base Package Includes:

- 5 Named users
- 5 Drip users\*
- 5000 emails per day
- Tight Integration with Sage CRM

## Pricing for add-on's per month:

	<u>Named User</u>	<u>Drip Users</u>	<u>Email Bundle (Per 1000 emails)**</u>
\$	7.99	9.99	4.99
Euro	5.99	7.95	3.99
£ GB	5.09	6.49	3.19
AUS	7.99	9.99	4.99
NZ\$	10.99	13.49	6.99

\* Integrated Drip marketing will be available in Sage CRM v7.1 SP1, Summer 2011



Sage E-marketing for Sage CRM

\*\* Additional Email bundles last for 1 month giving 1,000 extra emails per day

Sage CRM

# How does email allocation work in the base package and with add-ons ?

- With the base package you get 5,000 emails per day. These can be distributed amongst users as you wish. For example user 1 has a 2000 email limit , user 2 has a 3,000 email limit and users 3, 4 and 5 have zero – up to a max 5,000 email limit.
- If you send no emails on Monday, the unused emails do not rollover to Tuesday, you would still be limited to 5,000 emails per day.
- If you want to sent more then 5000 emails at once, additional bundles of 1,000 emails per day can be purchased for \$4.99 per month
  - This means times of peak demand can be easily catered for
  - For example if you purchase an additional bundle of 1,000 emails it means your send limit increases to 6,000 emails per day per the next month
- What happens if the number of contacts I want to send to exceeds my Sage E-marketing email allocation? In this case Swiftpage will not send any emails and you will receive a notification / warning message.
- The service will be available in the following currencies: US \$, EURO €, GBP £, Australian Dollars and NZ dollars

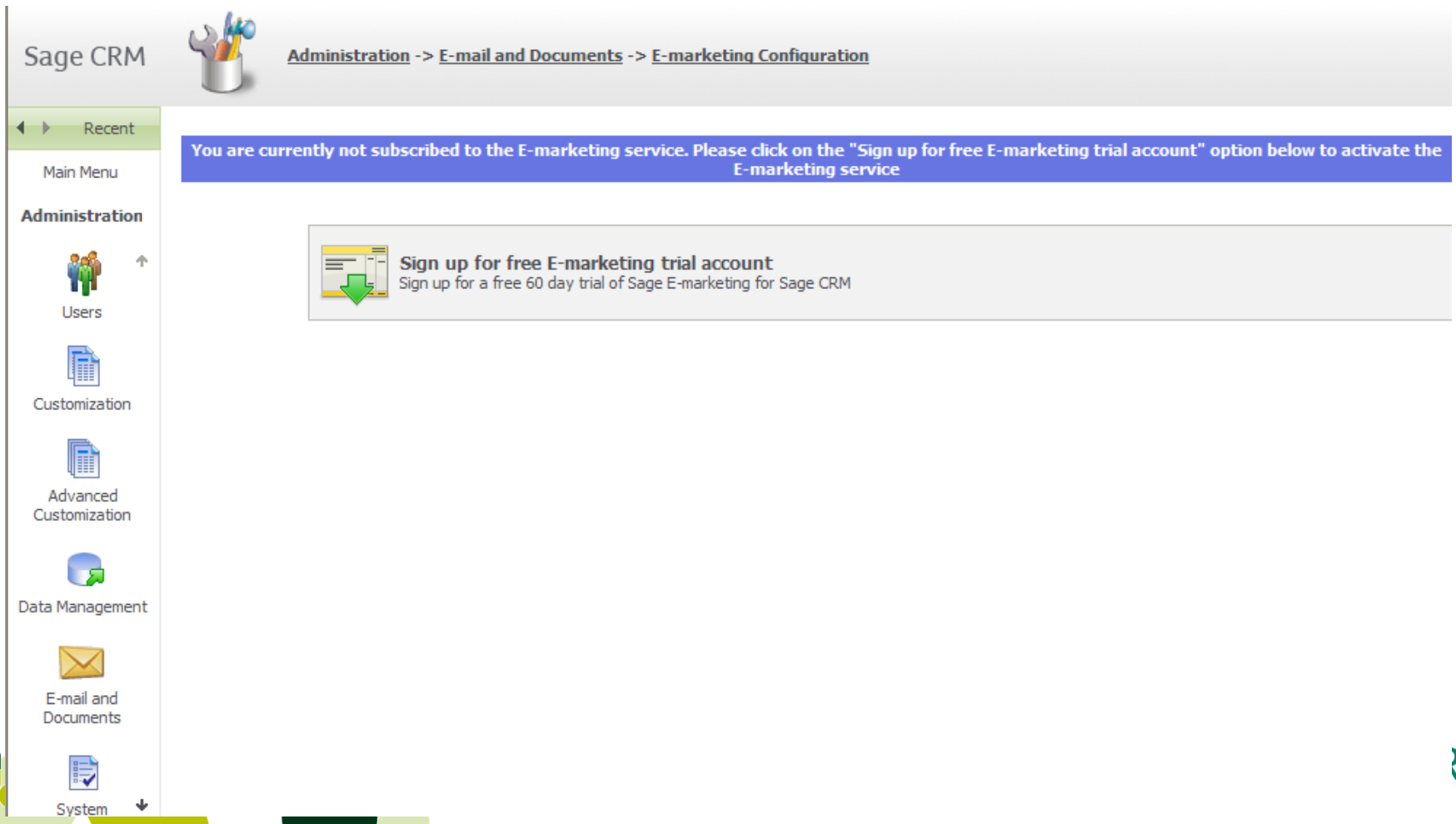
# What are the different pricing, currency and add-on options available?


- Sage CRM Pricing for service will be \$150 per month
  - This will be converted to local currency by Swiftpage
- The service will be available in the following currencies: US \$, EURO €, GBP £, Australian Dollars and NZ dollars
- Pricing is fixed amongst currencies to avoid fluctuations
- Additional bundles of 1,000 emails per day can be purchased for \$4.99 per month
  - This means times of peak demand can be easily catered for
- Additional users can also be purchased as needed
  - Additional Named Marketing users cost \$7.99 per month
  - Additional Drip Marketing users cost \$9.99 per month



# How do my customers sign-up?

- Once they have Sage CRM v7.1 installed they go to Administration/Email & Documents/E-marketing configuration
- They then simply sign up for a free 60 day trial



Sage CRM  Administration -> E-mail and Documents -> E-marketing Configuration


Recent


Main Menu

**Administration**

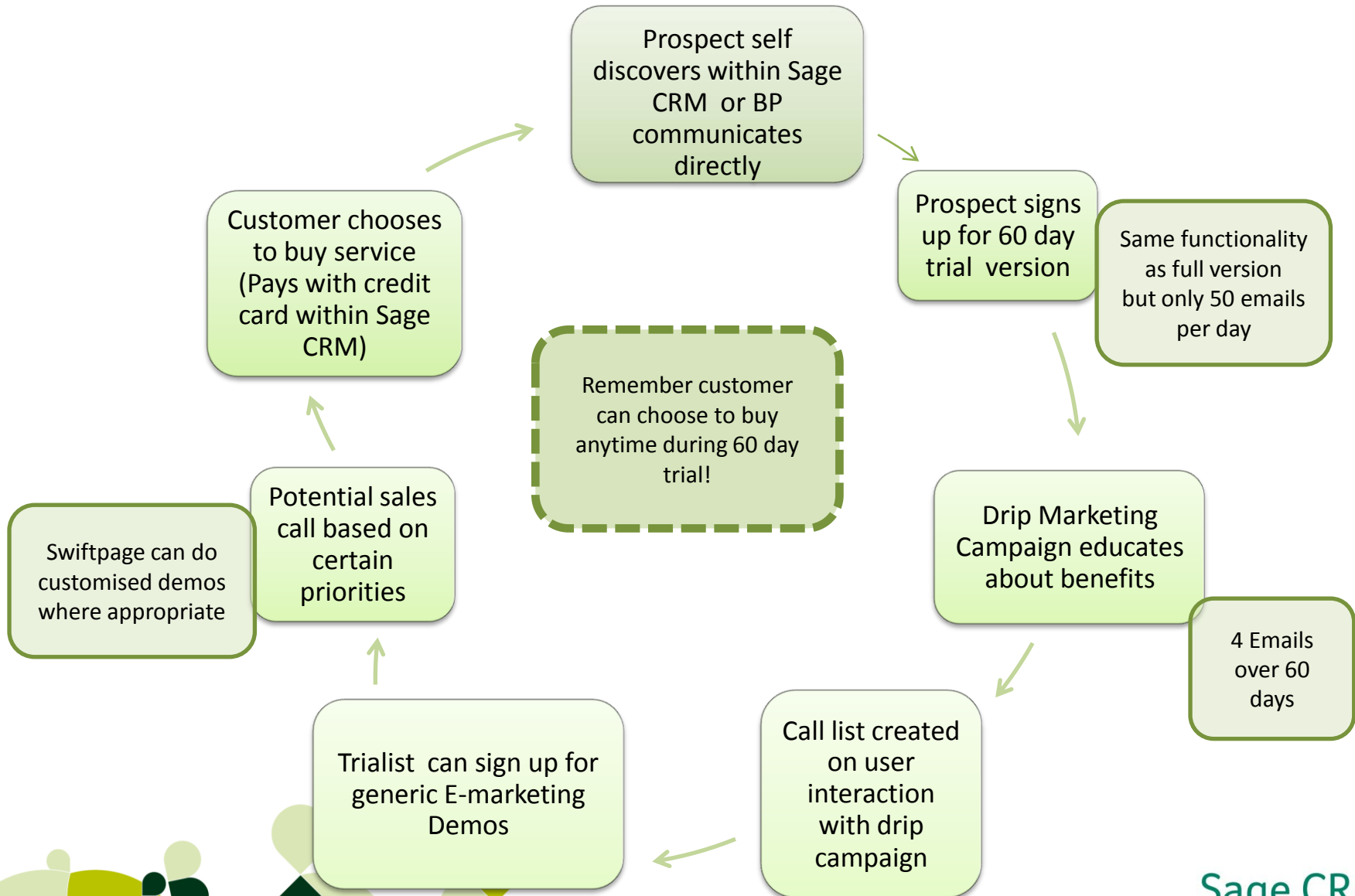
- Users
- Customization
- Advanced Customization
- Data Management
- E-mail and Documents
- System

You are currently not subscribed to the E-marketing service. Please click on the "Sign up for free E-marketing trial account" option below to activate the E-marketing service

 **Sign up for free E-marketing trial account**  
Sign up for a free 60 day trial of Sage E-marketing for Sage CRM



# What is the process for converting Sage E-Marketing trials to paid accounts?



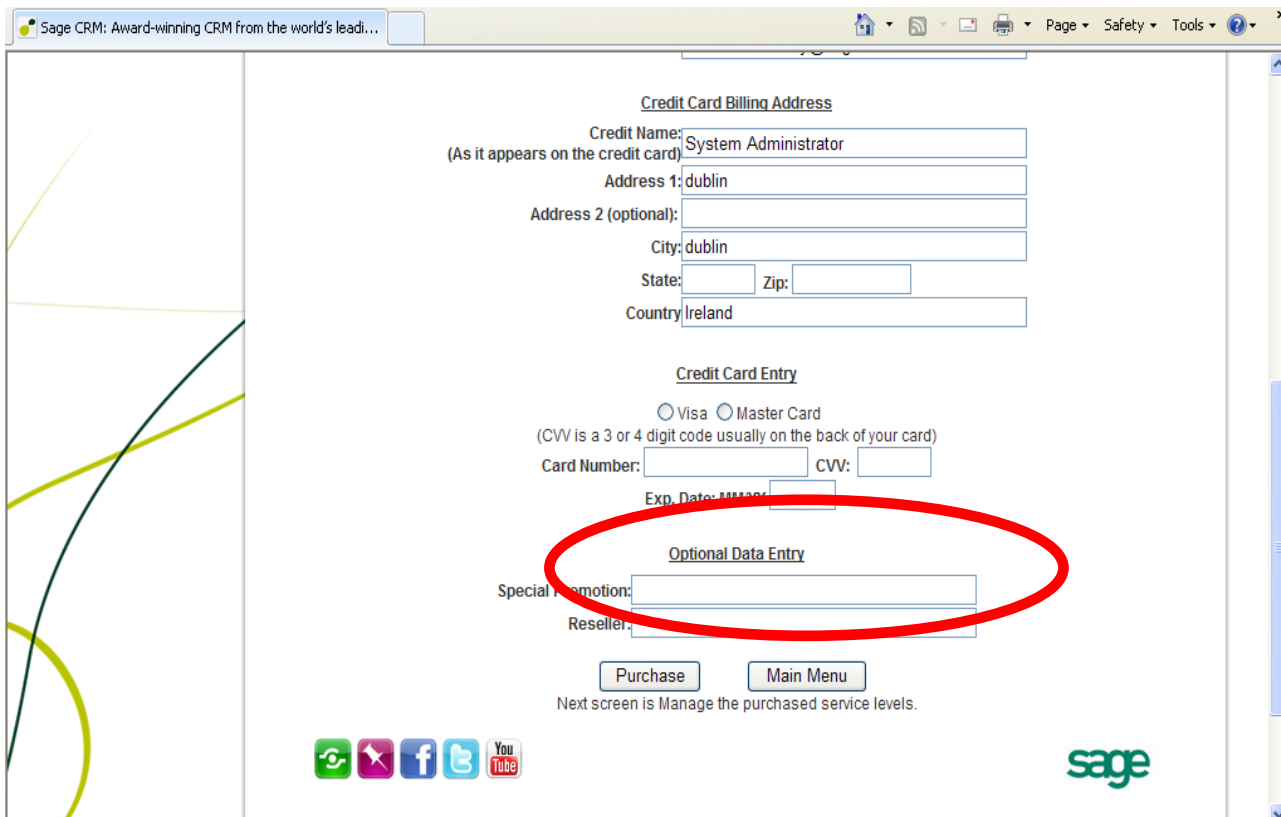
# What are the payment terms my customers have to adhere to?

- Your customers always pay in advance for use of service
- Your customers do not have a contract with Swiftpage (There is a EULA). Swiftpage accept payment at the beginning of their term for future service
- Your customers can choose to sign up on a monthly, quarterly or annual basis.
- For annual signs-ups customers get a 10% discount.
- The minimum signup period is 1 month.
- Your customers are automatically re-billed at the end of their service period



# How do I receive commission, how much do I get and when?

- Please ensure that any customers paying for the service enters your company name in the reseller field (Does not apply when signing up for a trial)
- To establish your commission rate please contact your local Sage Operating Company
- To establish when you receive commission rate please contact your local Sage Operating Company



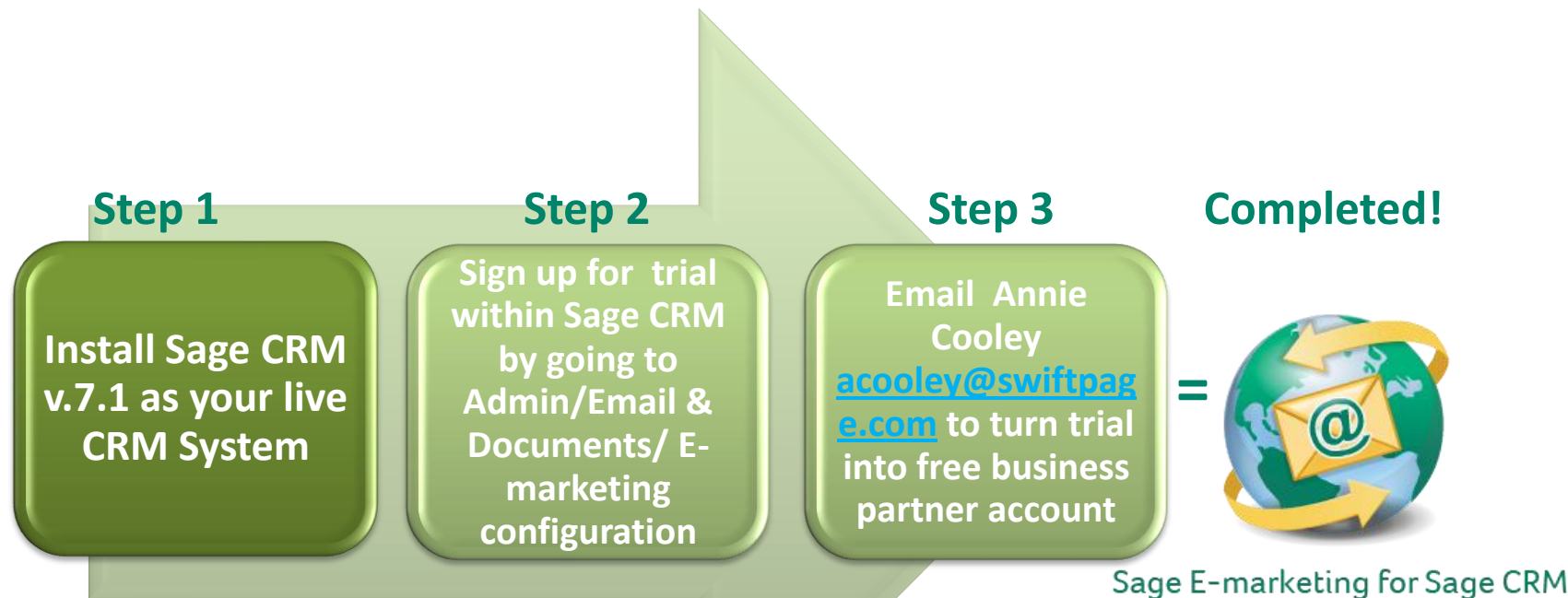
The screenshot shows a web browser window with the Sage CRM registration form. The form is divided into several sections:

- Credit Card Billing Address:** Fields for Credit Name (System Administrator), Address 1 (dublin), Address 2 (optional), City (dublin), State, Zip, and Country (Ireland).
- Credit Card Entry:** Radio buttons for Visa and Master Card, a note about CVV, and fields for Card Number, CVV, and Exp. Date.
- Optional Data Entry:** This section is circled in red and contains fields for Special Promotion and Reseller.

At the bottom of the form, there are buttons for "Purchase" and "Main Menu", and a note: "Next screen is Manage the purchased service levels." The Sage logo and "Sage CRM" text are visible in the bottom right corner.

# Can I as a Sage CRM business partner signup for Sage E-marketing for Sage CRM?

- The great news is you can!!
- .....and because you are a Sage CRM business partner you get to use it for **free**
  - To qualify for continued free use you must make at least 1 sale of Sage E-marketing for Sage CRM every 6 months
- To signup follow the simple 3 step process outlined below



# Tools to help Business Partners be successful

- All business partners are entitled to a free Sage CRM for E-marketing account

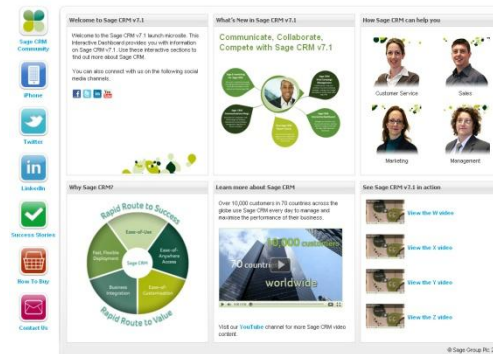
- Branded Sage CRM Templates with room for BP logos

- Sage CRM Microsite - can be packaged and reused by BP's

- Additional resources, e.g. whitepapers available on the Swiftpage site



## Introducing Sage CRM v7.1



# What kind of Service Level Agreement is there in place?

- Service Availability 99.5% or no more than 2 days of downtime per account server in the calendar year
- Tier 2 (+) support hours - 3:00 AM to 6:00 PM Mountain Time zone (-7 hours of GMT) for Tier 2 support
- Sage CRM addendum to include support for US holidays
- Response time within 2 business hours of escalation Monday – Friday
- Resolution time generally within 24 hours Monday – Friday



# How will Sage E-marketing for Sage CRM be supported?

- Sage business partners and Sage operating companies will be responsible for 1<sup>st</sup> and 2<sup>nd</sup> line support
- Most Swiftpage escalated queries involve billing and account questions. Few technical queries
- Support problems involving Sage CRM will be escalated from the business partner to your local Sage operating company as normal.



# Sage E-Marketing – Localisation – key areas

Localised for French, German & Spanish

What areas will be localised?

## **Core CRM Product: Responsibility Sage CRM Team**

- All SCRM screens
- E-Marketing section on v7.1 documentation including:
- What's New, Quick Start Guide , User and Admin Guides

## **Swiftpage Engine: Responsibility Swiftpage**

- Billing and provisioning
- Landing pages
- Trial sign-ups
- Associated communications around this

## **Others: Shared Swiftpage / Sage CRM Responsibility**

- Drip marketing emails (SP)
- Selected Number of templates (S)
- High level – E-marketing video (S)

## Other Information: Sage E-Marketing for Sage CRM

- Swiftpage are the service provider
- Sage E-marketing will be available from Sage CRM v7.1 onwards
- Tight integration with Sage E-marketing is not available in previous versions of Sage CRM
- Key functionality includes email blasts, scheduling and drip marketing\*
- Sage E-marketing for Sage CRM will only be sold as a bundle
- Customers can trial the full version for 60 days free!
- Available in any Sage CRM edition where users have access to the marketing tab

**\*Integrated drip marketing will be available in Sage CRM v7.1 SP1 (Summer 2011)**



For specific queries please contact you local Sage Operating Company



Visit the Sage CRM Ecosystem at  
[www.sagecrm.com](http://www.sagecrm.com)



Sage CRM



[www.sagecrm.com](http://www.sagecrm.com)



Sage CRM (Official Group)



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