

Sage CRM Workflow: Design the Ultimate Customer Experience

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Introduction

Entrepreneur and Zappos.com founder Tony Hsieh said it best: “We believe that customer service shouldn’t be just a department; it should be the entire company.” More than ever, it is critical for businesses to deliver a superior customer experience or risk losing to the competition. But how do you empower all the departments across your organization to do that while operating efficiently?

Manual processes slow down sales and marketing efforts and hamper customer service. Does your organization struggle with any of these issues?

- 1. Sales**—Delays getting accurate quotes to customers; pipeline tracking takes too long; inconsistent sales follow-up.
- 2. Marketing**—Efforts are not coordinated with sales; promotions often compete against one another; not sending right messages to right audience; can’t measure effectiveness of campaigns.
- 3. Customer Service**—Poor customer support due to incomplete or inconsistent information, which results in longer time for case resolution.

Whether you suffer from one, some, or all of these challenges, the end result is a lackluster customer experience. You have put your business at risk of losing customers.

A Customer Relationship Management (CRM) solution helps you overcome these pain points and support customer-focused strategies with fewer resources. CRM helps you manage a wealth of customer information in one central location and automates key processes throughout your organization so you can consistently deliver exceptional customer service at all times.

Your company can enjoy a competitive advantage by improving process efficiencies with workflow automation. This paper will examine the benefits of workflow automation and how it drives user adoption, reduces errors, and improves communication throughout your organization. Workflow automation can positively impact your overall CRM return on investment (ROI) by supporting your ability to provide fast and consistent customer service and keep customers coming back.

How Does Workflow Automation Impact My Business?

We all know that errors and redundancy waste valuable time in any process. Workflow automation eliminates those problems and paves the way for smooth processes even in difficult conditions.

When describing the benefits of process centric CRM solutions, [Forrester analyst](#) William Band says, “Their value lies in the workflow engines and automation. The result is speedier and more flexible decision making and information processing and compliance with corporate policies. By extending business process management best practices and technology to the front office, customer service organizations are finding that they improve the consistency of service delivered, elevate agent efficiency, personalize service, and meet compliance goals.”

With a set of predefined and repeatable best-practice workflows in place, you can:

Reduce administrative errors.

Automated workflow takes some of the “human element” out of the process. When you design a workflow in Sage CRM, it drives the process through to completion. It ensures that the steps in each process are followed in the right order and that the right people are receiving the information they need at the right time in the process.

Improve business process efficiencies.

A February 2013 Aberdeen report¹ found that 38% of best-in-class companies use workflow automation to help visualize, design, and alter processes versus 20% of all others. Using visual workflow design tools, you can see the bottlenecks and redundant tasks and make appropriate changes to streamline the process. At the same time, managers benefit from increased visibility into processes to ensure that all contact points with customers are handled effectively and efficiently.

Improve communication and collaboration.

Sage CRM drives collaboration across the organization with the ability to easily access and share business information. By leveraging workflows to send automated, electronic communications, you can ensure that every department is on the same page. Sales can see active marketing campaigns and responses, marketing can match the right communication to the needs of the customer, and customer service can provide timely issue resolution. Alerts and notifications can be automated so that nothing falls through the cracks.

Drive user adoption.

Workflow automation makes the system easy to learn and use. It increases personal productivity by eliminating the guesswork from each process. As you empower each user with the right information at the right time, you get better insight into the customer and enhanced decision-making ability.

“With Sage CRM, the next step is automatically built into the process, so we’re always moving forward to make the most of sales opportunities and build closer customer relationships.”

Mark Lightowler, managing director, Kaisersberg Plastics

¹ Business Process Management, Aberdeen Group, February 2013

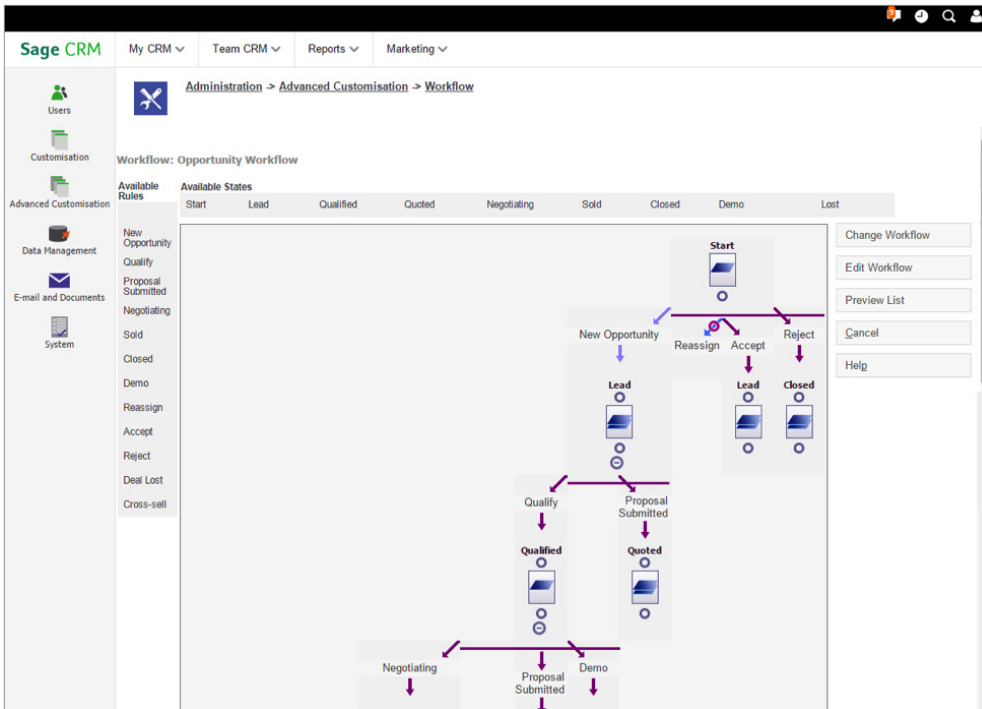
How Workflow Drives Sales Force Automation

To boost your sales team's success, it is critical to define a process, set goals, and track progress. Using Sage CRM Workflow Automation, you can build popular sales methodologies right into the system to ensure consistent follow-up. For example, you can automatically create a follow-up call reminder in your calendar after sending a proposal or quote.

Sage CRM maintains account history, and you have the power to control how information flows through your organization. By automating sales workflow, you can track every lead from first contact to final sales closure. Alerts and notifications can be automatically sent to remind sales representatives when to call and follow up with prospects. You can design the workflow so that input is required every time the representative interacts with the prospect in order to ensure consistent service and accurate tracking of pipeline progress. Sage CRM holds everyone accountable so you can trust that your sales team is following best practices and corporate-approved processes.

Here are some ways you can benefit from sales workflow automation:

- Standardize lead qualification and follow up protocol
- Achieve consistency in prospect communication
- Automate the approval of quotes and discounts
- Automate and assign rules-based tasks
- Improve analysis of pipeline progress



Sage Visual Process Flows provide a graphical process-oriented interface, giving you a clear view of the steps and tools required to complete a task. Using the Visual Process Flow Designer, you can easily create custom flows for unique needs and specific roles. Your new employees will increase their productivity faster, and you'll streamline the tasks you rarely need to do, such as physical count.

The screenshot displays the Sage CRM interface for configuring workflow and escalation settings. The breadcrumb trail is "Administration > Advanced Customisation > Workflow & Escalation Configuration". The main area shows a configuration screen for "Workflow/Escalation" with the following settings:

Workflow for cases: Yes	Workflow for solutions: Yes	Workflow for campaigns: No
Workflow for opportunities: Yes	Workflow for leads: Yes	
Workflow for companies: Yes	Workflow for people: Yes	
Escalation: Yes	Notify interval (sec): 300	Notification Display Count: 10
Escalation engine tuned for: Immediate delivery	Notify E-mail name:	Notify E-mail address:
Default targets for high priority reminder messages: Desktop E-mail	Default targets for normal priority reminder messages: Desktop E-mail	Default targets for low priority reminder messages:
Maximum SLA Actions: 5	Use Escalation Service: Yes	

With the Workflow and Escalation Configuration screen, you can activate workflow for cases, solutions, opportunities, leads, and more. You can also activate notification reminders and escalation rules. For example, when the system escalates an unsolved case, an email will be automatically sent to the team leader as part of the case workflow.



Sage CRM Workflow can streamline many processes in your organization to improve the customer experience, including customer service and marketing. Workflow automation improves customer service levels by providing a repeatable process for information gathering, case escalation, and issue resolution.

Sage CRM helps you manage and resolve customer queries and issues efficiently and effectively with access to a 360-degree view of every customer. Plus, if a case remains open for longer than a predefined period of time, Sage CRM Workflow can trigger an automatic notification to the customer care manager for immediate action.

With visual workflow design tools, you are empowered to automate any process in your business. These tools are easy to use and can be done without coding experience. Simply use the intuitive, graphical drag-and-drop method to change the order of a process or utilize drop-down menus to select the parameters you desire.

Improve your marketing effectiveness with workflow automation

Sage CRM Workflow helps you create targeted marketing campaigns that can be easily measured so you spend your budget wisely. Leveraging closed loop communication, you can control communication, track progress, and measure success all in one screen.

Using Sage CRM to automate marketing workflow, you can:

- Create high-quality, targeted marketing communications.
- Track all interactions including open rates, clicks, and bounces.
- Measure campaign effectiveness and learn from past experience.

[Watch this short video](#) to learn more about what Sage CRM can do.

Summary

More than 12,000 global organizations use award-winning Sage CRM to manage critical sales, marketing, and customer service activities. Workflow automation helps your business make the most out of sales opportunities by tracking your efforts from first contact to sales closure—and sharing information with other stakeholders throughout your organization. Plus, you'll be able to better plan, execute, and measure the success of your marketing campaigns. Sage CRM helps you target the right messages to the right prospects at the right time, making the best use of your budget and resources.

Workflow automation paves the way for high-quality customer care with consistent, repeatable, and effective interactions—ensuring you deliver an exceptional customer experience. With Sage CRM, you'll not only win new customers, but also maintain long, happy relationships.

“It's not just the wine that needs to flow smoothly when you're trying to build a great reputation for wine making. A transparent exchange of information between sales, distribution, and marketing is just as critical an ingredient for success. ”

Ian Parker, IT manager,
Sirromet Wines

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