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### Did You Know?

A new survey commissioned by Sage Software reveals that small and mid-sized businesses must use their customer relationship management (CRM) database as a tangible asset and a differentiator to obtain the best value from their business at an exit, succession, or transition.

Having customer data in a single CRM system is a valuable asset according to 70 percent of respondents with exit strategies. Having a central record of all customer relationships is a significant business and financial asset for companies seeking an exit, whether the exit strategy is a trade sale, succession, venture capital funding, or public offering.

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## SageCRM v6 New Features And Functionality

**S**ageCRM v6 is scheduled for release in March 2007. This latest version is loaded with new features that make SageCRM even more powerful and easier to use. Let's preview what you can expect.

### On-Screen Training And Coaching

SageCRM v6 offers a number of new features that make learning and using SageCRM fast and easy. Located on the **Quick Start** tab, there are new training and coaching features—including videos—to help you and your staff quickly become proficient with SageCRM v6.

Start off with a **Tour** that familiarizes you with various SageCRM features and tasks.

SageCRM v6 also adds **Wizards** to assist you with setting user and administrative preferences.

A series of **Quick Tips** outline the steps used to accomplish common tasks or navigate through the program. These tips are handy even for more experienced SageCRM users who may need to take on an unfamiliar task.

To eliminate confusion and foster confidence, SageCRM v6 adds new **Educational Coaching Captions** to ensure that you know what you're working on at all times.

In addition, links to documentation for both users and administrators ensure that related information is available to you when you need it.

### Finding The Information You Need

SageCRM v6 introduces a redesigned Find interface. **Advanced Find** makes locating the specific information you're looking for fast and easy. Using a flexible and powerful **Advanced Search** engine, you can now search for communications by keywords. **Advanced Find** also supports nested statements so you can conduct helpful *And/Or* searches.

With **Advanced Query**, you can build your own search queries by specifying fields and values. You also can use **Advanced Query** to conduct searches against the data in reports.

### Regrouping

The **Groups** functionality within SageCRM gives you the ability to organize company, contact, or opportunity records based on common characteristics. If you have used **Groups** within SageCRM, you know how powerful they can be. SageCRM v6 adds a new **Groups** tab within **My CRM** allowing greater access to **Groups** and their functionality.



SageCRM v6 includes a handy Quick Start tab displaying various training, coaching, and information resources.

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## SageCRM v6 CONTINUED

Now, you can work with the Groups from a central point, or from other areas in the system and have the ability to perform actions including mailers, mass e-mails, alerts, mail merges, and global record updates.

Both Static and Dynamic groups are available. A Static group remains unchanged regardless of changes to the database, while a Dynamic group is automatically updated to always include members that meet the criteria set for that Group.

### Territory Management

In SageCRM v6, moving and merging territories can be done easily in the Administration area using the **Territory Tree**. The improved and more flexible Territory Tree is a simple, code-free way to realign your territories.

### Security Improvements

SageCRM v6 includes changes to **Field Level Security** to improve usability while maintaining system security. Security on fields is now applied using check-boxes, rather than requir-

ing knowledge of code. Security is applied on a once-off basis at the Field Level, rather than at the screen level, and can be applied to users, teams, or profiles. Field Level Security applies security throughout the product including screens, lists, reports, and more.

Please call us for complete details of this upcoming release for SageCRM. ☆

## Effective E-mail Marketing

**E**-mail marketing is as popular as it is for one simple reason—when done correctly, it works. How can you beat the SPAM filters? How can you ensure your message rises to the top of the in-box and gets read? What are your prospects looking for in an e-mail message? In this brief article we'll take a look at what you should keep in mind as your company launches and refines its e-mail marketing campaigns.

### Avoiding SPAM Filters

SPAM filters are becoming increasingly restrictive. Here are a few tips to help ensure your message makes it through.

- ▶ Keep your subject line short and informative—no commas or exclamation points.
- ▶ Make it personal—a message from bob@mycompany.com is more likely to get through than one from info@mycompany.com.
- ▶ Don't get too creative. Graphics are fine if they're relevant, but use them sparingly.
- ▶ Use a SPAM-checking service or software. It will scan your message and let you know what the typical SPAM-filters may reject.
- ▶ The best way to ensure your e-mail is delivered is by having your contacts *whitelist* you by putting your address on their safe sender list as well as in their e-mail address book. Consider adding a line in every e-mail you send that says, "Put bob@mycompany.com on your safe sender list, and add it to your e-mail address book."

### Beating The Competition

You have only a small window of time to keep that recipient interested enough to read your message. Most of us receive several, or several dozen, e-mail marketing messages every day. How can you be sure your message gets read?

- ▶ State your point. Make certain the purpose of your e-mail is clear and include it early in the message.
- ▶ Add value. Include a special offer only available online, for example.

### Make It Count

Once you have the recipient's attention, here are some tips to increase your response rate.

- ▶ Include a call to action. Your message must be compelling enough to get the recipient to do something.
- ▶ Be consistent. Messages from different individuals or departments in your company should have a common look and feel.
- ▶ Use what you know. Do you know the recipients' age or gender? Do you know what they purchased before? Use your knowledge to target your message.
- ▶ Send a survey. The best way to know what your customers and prospects want is to ask them.

### Keep It Legal

Spamming is more than annoying—it's illegal. Here's how to keep your e-mail marketing legal.

- ▶ Remember to include an unsubscribe link in your e-mail.
- ▶ Be certain to include your company name and physical address in the message.
- ▶ Tell the truth. No false or deceptive subject lines.

SageCRM offers tools that allow you to develop, send, review, and refine your e-mail marketing campaigns. Please give us a call with any questions you may have about increasing the effectiveness of your e-mail marketing. ☆

## Did You Know?

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According to Sage Software, having a CRM system provides a strong negotiation tool in which to maximize the value of your business because it provides any future owner or manager insights into the customer base and opportunities. This not only allows them to hit the ground running, but also minimizes disruption to customer service. ☆