



## Sage SalesLogix Visual Analyzer | Product Brief

Sage SalesLogix Visual Analyzer is a comprehensive, interactive business analytics tool that allows you to bring your Sage SalesLogix data to life. SalesLogix Visual Analyzer delivers customizable dashboard views of key Sage SalesLogix data, for a low cost of deployment, providing your organization the insight needed to extend your competitive advantage.

### Gain Critical Business Intelligence

The ability to make fast, reliable decisions based on accurate and usable information is essential to most business enterprises. The SalesLogix Visual Analyzer solution was specifically designed to support customization of dashboard features to illustrate your business state-of-health in a format that is meaningful to you. There are ten pre-built dashboards to choose from, depending on how you and your team prefer to slice and dice critical business analytics. SalesLogix Visual Analyzer fluidly pulls together your existing customer data residing in the Sage SalesLogix database into a consistent, single point of analysis for everyone—from executives, to sales, marketing, and service employees.

SalesLogix Visual Analyzer enforces the security settings your administrator has put in place for Sage SalesLogix. Therefore, when you change a security setting in Sage SalesLogix, it updates SalesLogix Visual Analyzer, streamlining work for administrators and ensuring users will see only the data their security profile allows.

### BENEFITS SNAPSHOT

Analyze critical business metrics that illustrate your organization's state-of-health.

Make fast, reliable business decisions based on accurate and usable information to help shift strategic priorities.

Focus your teams' efforts on the most effective activities.

Optimize your investment by connecting important customer data stores for a more holistic view.



- The KPI dashboard provides an instant picture of the effectiveness of your business.

### Integrate Your Reporting to Enhance Your Data

SalesLogix Visual Analyzer offers the ability to create connections to your customer data stores, from back-office to off-the-shelf solutions. By extending SalesLogix Visual Analyzer with information from other applications, you'll transform silos of disconnected data into actionable information for your entire organization.

This reporting integration is powered by a fully optimized system that speeds data load time, even when your data sources are very large. SalesLogix Visual Analyzer KPI dashboards use a separate data repository, or warehouse, so the performance of your main Sage SalesLogix database is not affected.

## Dashboard View Features

### KPI Dashboard

Considered the "home base" of SalesLogix Visual Analyzer, the KPI (key performance indicator) dashboard is the main summary page for all critical business metrics. Easy-to-understand gauges illustrate the current health of selected components of your organization, such as total sales or opportunities year over year. Based upon the security viewing profile established, you are able to drill down from the dashboard view into the selected transaction details for further analysis.

Starting from the KPI dashboard, you can navigate to the nine other dashboard views available in SalesLogix Visual Analyzer. More than just static views of data, SalesLogix Visual Analyzer supports a connection with pre-existing customer data stores that transform silos of disconnected data into actionable business insight.

### Forecast Dashboard

Understanding sales trends and making appropriate, timely adjustments can have a big impact on sales performance. The Forecast dashboard allows you to analyze your sales pipeline, forecasts, and close rates. You can determine the stage at which opportunities are being delayed, where to introduce new programs to help bolster sluggish sales, and which sales representatives require assistance to help meet goals.

**"Our marketing communications has been able to track ROI now through SalesLogix Visual Analyzer with all their marketing communications initiatives. They really are able to find out where they're spending their money, where they should be spending it, where they're not going to spend it anymore."**

— **Natalie Botolado**  
Systems analyst and marcom specialist  
Veeco Instruments, New York

To further illustrate potential sales opportunities, forecasts can be segmented by sales representative, product line, or region. A historical analysis can help estimate future sales growth.

### Ranking Dashboard

The Ranking dashboard provides a list or ranking for any KPI you may choose, such as Accounts, Sales Representatives, Opportunities, Products, or other entities in the Sage SalesLogix database. A popular ranking feature is the Top Ten Accounts, but you have the flexibility to rank whatever set of metrics is most meaningful to you and your business. You can also choose to rank from the bottom up, identifying customers with slower performance that need additional sales and marketing support. Once the list is established, you can create a Sage SalesLogix Group and then launch a targeted marketing campaign to that Sage SalesLogix Group.

### Win/Loss Dashboard

The Win/Loss dashboard helps you understand how well you and your sales team are closing opportunities. The graphical chart shows win and loss units by month, while the grid positioned below provides detailed information for each opportunity won or lost. This perspective enables you to consider your company's performance as compared to that of the general market. As a result, your strength in a particular industry could shape your strategic goals and objectives.

### Opportunities Dashboard

Your sales team will especially appreciate the Opportunities dashboard, as they can identify the opportunities with the best

chance of closing in the current period. With just a couple of clicks, they can parse out the list of all opportunities in their territory that are in the mid stages of the sales process. This target list can then be built onto a Sage SalesLogix Group to be easily accessed while actively working the opportunities.

### Maps Dashboard

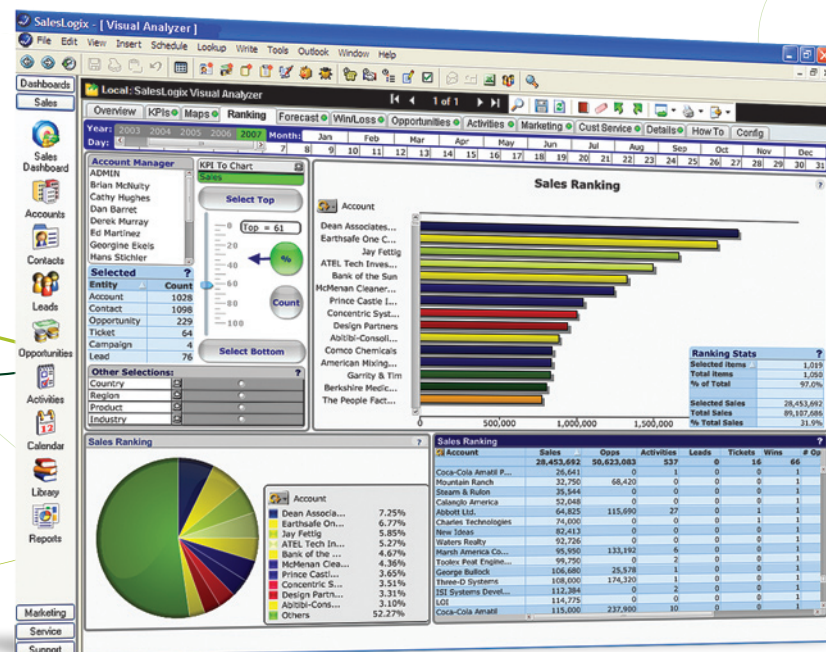
The geographic Maps dashboard shows analysis information overlaid on a map. Data can be viewed by region, country, state, city, and metropolitan area, and then drilled down further in a specific region to conduct territory analysis.

### Activities Dashboard

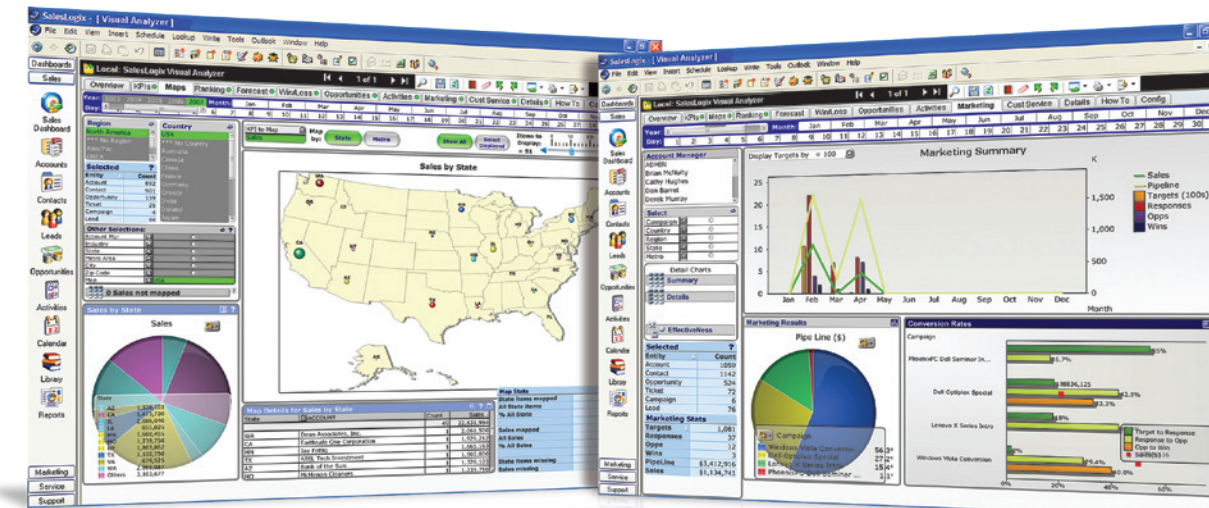
The Activities dashboard provides an introspective view into the types of prospect touches and communications it takes on average to close a sale. It also explores the number of communications it takes to close a sale. Consider the success rate of face time versus phone calls versus e-mails, and the power of those personal interactions with customers. If you are an Account Manager, you can select a customer record and receive a historical list of previous contact with your client.

### Marketing Dashboard

The key to continual growth in a sales pipeline is strong marketing initiatives. The Marketing dashboard tracks the vital metrics required to determine the effectiveness of marketing programs. This view will help you analyze campaign response rates, sales success, and conversion rates—from mailing list prospect to interested client.



• The Ranking dashboard allows you to see your Top Ten Accounts at a glance.



• The Maps dashboard provides a visual perspective on geographical sales support and performance.

• Use the Marketing dashboard to track campaign performance and make adjustments as needed to maintain a strong pipeline of leads.

## Customer Service Dashboard

The backbone to any customer relationship management tool is the ability to track and analyze the Customer Service experience. This dashboard gives you an instant picture of service levels with an analysis of reasons for customer calls, resolution rates, and average length of time to resolve an issue. Drill down to the details of a particular case or ticket to explore the historical profile and initiate an informed response.

## Details Dashboard

The Details dashboard provides a single-screen view of the Sage SalesLogix details for the selected record. It presents the Account Detail view with all the tabs spread out on a single page, so that every data point related to the Account can be viewed simultaneously.

For more information, go to:  
[www.sagecrmsolutions.com/saleslogix](http://www.sagecrmsolutions.com/saleslogix)

Or contact your certified Sage SalesLogix Business Partner. To find a Business Partner in your area, call 800-643-6400.

To register for an online demonstration to see how Sage SalesLogix can help your business, go to:  
[www.sagecrmsolutions.com/demo/sagesaleslogix](http://www.sagecrmsolutions.com/demo/sagesaleslogix)

**“Now with the implementation of SalesLogix Visual Analyzer, it’s not just showing us where our business is, it’s driving our business now.”**

— Natalie Botolado  
Systems analyst and  
marcom specialist  
Vecco Instruments, New York

## About Sage SalesLogix

Your highest priority is to grow your business, and your business tools should help you achieve that goal. Sage SalesLogix provides a complete view of customer interactions across sales, marketing, customer service, and support so your teams can collaborate and respond promptly and knowledgeably to customer inquiries and opportunities. With flexible access options, powerful process automation capabilities, and a highly customizable platform, Sage SalesLogix is a comprehensive solution that will help you achieve stronger sales and a more successful business, now and into the future.

## About Sage CRM Solutions

Sage CRM Solutions is a portfolio of market-leading applications consisting of ACT! by Sage, SageCRM, and Sage SalesLogix. Over 63,500 organizations and 3.1 million users worldwide rely on Sage CRM Solutions to develop profitable, long-term business relationships.