

# Sage SalesLogix | In the Cloud Reference Guide

## The SalesLogix Cloud Advantage

The cloud edition of Sage SalesLogix offers customers the best of both worlds—a full-featured, flexible CRM solution with full ownership of data combined with the attributes of a SaaS CRM solution like payment and contract flexibility, access to data online, and the ability to get up and running quickly. Sage leverages Amazon's Web service, Amazon Elastic Compute Cloud™ (EC2™), to host the necessary hardware infrastructure and the award-winning Sage SalesLogix application for its customers.

### Top Differentiators

- Data Ownership
- Enterprise-class Support
- Greater Storage per User
- Upgrade Control
- Integration & Customization

## Value Proposition & Competitive Position

Software as a Service (SaaS) CRM offerings have been great for businesses that want to reduce their IT burden, avoid capital expenditures, and get their CRM solution up and running quickly. But, some hosted SaaS solutions have some disadvantages too, like being stuck with a proprietary platform, not being able to own your valuable customer data, being locked into long contracts, and having to pay excessive costs for extra storage per user. The cloud edition of Sage SalesLogix offers the best of both worlds—a full-featured, flexible CRM solution with full data ownership combined with the attributes of a SaaS CRM solution like payment and contract flexibility, access to data online, and the ability to get up and running quickly.

Below are **talking points** to use with customers and prospects that highlight the *unique* advantages of the Sage SalesLogix cloud solution:

- You **own your data** right from the start. Should you want to switch between a cloud-based and an on-premise solution, you get your data back intact—unlike other vendors who provide flat files that do not include metadata like entity relationships and hierarchies.
- You have **access to enterprise-class support**. Your solution will be managed by the Sage service operations team who will provide provisioning/setup, backups, hosting infrastructure support, and Windows and database maintenance.
- You'll receive **greater storage space per user** from the start of service than other vendors provide. Most vendors offer little storage space from the start, which means you might have to pay for incremental storage per user later—decreasing your total cost of ownership.
- You have **total control over upgrades**. When the latest software is released, you choose when to upgrade at a time most convenient to you.
- **Integrate** your other business applications and Web services for a complete, holistic view of your customers.

## Target Opportunities

Target Market	Trigger	SalesLogix In-the-Cloud Benefits
New to CRM	<ul style="list-style-type: none"> <li>CEO/VP Sales finds it difficult to represent and track the pipeline</li> <li>Company growth (10 to '000's of sales people)</li> </ul>	<ul style="list-style-type: none"> <li>Grow with your needs</li> <li>Data ownership, deployment flexibility, price, TCO, usability</li> <li>Sage/Partner expertise</li> </ul>
Replacement CRM	<ul style="list-style-type: none"> <li>Current solution: on-premise or SaaS-based solution is not meeting needs</li> <li>Disgruntled with current vendor relationship</li> </ul>	<ul style="list-style-type: none"> <li>SalesLogix customization/sophistication</li> <li>Data ownership, deployment flexibility, price, TCO, usability</li> <li>Sage/Partner expertise</li> </ul>
SalesLogix On-Premise Upgrades and expansion	<ul style="list-style-type: none"> <li>Want to keep Sage SalesLogix experience with SaaS benefits</li> <li>New Web client functionality</li> <li>Prefer OpEx vs. CapEx</li> </ul>	<ul style="list-style-type: none"> <li>Sage/Partner/SalesLogix familiarity</li> <li>Data ownership, deployment flexibility, BP expertise, price, TCO</li> <li>Retain investment in licenses, pay low M&amp;S + Hosting fee</li> </ul>

## Naming Conventions

You may use "the cloud edition of Sage SalesLogix", "Sage SalesLogix in the cloud," or "Sage SalesLogix cloud solution" but you may **not** use it as a proper name, e.g., Sage SalesLogix Cloud Edition.

## Pricing & Configuration

**\*Configurations and pricing have not been certified and are subject to change.**

	Workgroup <sup>1</sup>	Professional <sup>2</sup>	Enterprise <sup>2</sup>
New Subscriber (named) PUPM	\$20 - \$30	\$65 - \$75	\$95 - \$110
New Subscriber (concurrent) PUPM	n/a	\$97 - \$113	\$142 - \$165
IB (Migration) Subscriber PUPM	n/a	\$45 - \$55	\$65 - \$80
On-demand Users (30 day use)	n/a	\$75 - \$85	\$95 - \$115
Users	5 (min & max)	5 – 100s	10 – 100s
Contract Length (minimum)	12 month	12 month <sup>3</sup>	12 month <sup>3</sup>
Storage Per User <sup>4</sup>	1 GB	2 GB	2 GB
Traditional Product Support	\$TBD	•	•
User Training	\$500	•	•
Sales Functionality	•	•	•

Marketing, Service, Support Functionality	•	•
SpeedSearch	Standard	Advanced
External Application Access		•
Self-service Portal	\$TBD	•
Integration Contract	\$TBD	•
Disconnected Client	\$TBD	•
SalesLogix Mobile	\$TBD	\$TBD
ExchangeLink	\$TBD	\$TBD
SalesLogix Visual Analyzer <sup>5</sup>	\$TBD	\$TBD

<sup>1</sup> Available in Phase 2 or October 2011

<sup>2</sup> Available in Phase 1 of April 2010 exclusively through the Business Partner channel

<sup>3</sup> Discounts available for longer contract lengths

<sup>4</sup> Additional storage may be purchased

<sup>5</sup> Contingent on negotiated cloud pricing agreement with QlikTech

## Customer Billing

With Sage SalesLogix in the cloud, customers can enjoy the convenience of a low monthly subscription fee with flexible billing terms. Customers can choose to be billed monthly, quarterly, or annually depending on their preferences, and they can choose to have their credit card billed directly, or be invoiced.

## Service Operations

The Sage service operations team will provide enterprise-class support including:

- Provisioning/setup of systems
- Backups
- Hosted infrastructure support
- Monitoring
- Windows and database maintenance

## Partner Compensation

In the first year partners will receive 25%, 25% in the 2<sup>nd</sup> year, and 10% in the 3<sup>rd</sup> year paid out upfront each year for an entire year's worth of subscriptions—as long as they remain the reseller. Note: Partner margins will be paid on Sage SalesLogix cloud deals beginning in Phase 1.

As an authorized reseller, partners will also receive full Tier and President's Circle credit for referrals.

## Phase 0 Pre-built Demo Images

Sage has have created pre-built images that partners can leverage for Demos and Proofs-of-Concept.

Benefits of Using Demo Images in the Cloud:

- Time: Less time building demos, more time to focus on selling
- Cost: Pay per usage—as little as 12 cents/hour
- Collaboration: Easily share responsibilities of preparing for a demo
- Faster Performance
- No hardware investment

- Easily share demos with teammates
- Demos are automatically accessible to your customers, anywhere in the world

**Sign-up NOW!**

Go to <http://tinyurl.com/slxcloud> to sign up for an Amazon EC2 Account. Send an e-mail to [tyler.crowder@sage.com](mailto:tyler.crowder@sage.com) with your 12-digit Amazon account number requesting access to the demo images.

**Phase 0.5**

Phase 0.5, the first phase of the cloud edition of Sage SalesLogix, launched December 1, 2009, and is open to new and existing customers that are interested in hosting their Sage SalesLogix installation in the cloud.

<b>Pricing</b>	\$20 per user/per month (Customers only pay the monthly Hosting Cost - until the end of Phase 0.5). After this period, customers will begin paying normal SalesLogix cloud pricing.
<b>Billing</b>	Monthly or upfront payment
<b>Customer Requirements</b>	<ul style="list-style-type: none"> <li>• Minimum of 5 users, Maximum 200 users</li> <li>• Bi-weekly feedback</li> <li>• Dedicated contacts</li> <li>• Currently aligned with a Business Partner</li> <li>• Act as a customer reference (Provide quotes for press release, featured in a case study, etc.)</li> </ul>
<b>Ideal Phase 0.5 Candidates</b>	<p><b><u>Installed Base Customers</u></b></p> <ul style="list-style-type: none"> <li>• Currently running SalesLogix v7.x Web</li> <li>• Not running Visual Analyzer or Mobile (these components will be available in Phase 1)</li> <li>• Already have a corporate priority to move applications to the cloud or have expressed interest in moving to the cloud</li> <li>• Limited IT resources</li> <li>• Off-plan customers</li> </ul> <p><b><u>New Customers</u></b></p> <ul style="list-style-type: none"> <li>• Shopping for a Hosted Solution—considering Salesforce.com</li> <li>• Limited capital</li> </ul>
<b>Sign-up Process</b>	<ul style="list-style-type: none"> <li>• BP nominates customer early during sales process through their RAM/RSM. Your RAM/RSM will help you to complete the application process.</li> <li>• Sage approves customer</li> <li>• Partner continues to work the deal</li> <li>• Customer signs customer agreement when deal is closed</li> </ul>
<b>Turn-around time</b>	Environment setup within one business day of completed agreement.

## **Phase 1: Limited Availability**

Limited availability of the cloud edition is targeted for spring 2010.

## **Impact/Opportunity for Business Partners**

- More new business opportunities: Drive 2x Net New Adds in Year 1
- Professional & Enterprise editions will be sold exclusively through the channel
- Workgroup customers will be aligned to a partner as they graduate to Professional/Enterprise
- More opportunities to provide professional services to cloud customers
- Greater retention of current install base
- Opportunity to provide vertical solutions in the cloud
- Opportunity to capture competitors' customers

## **Training & Certification**

Partners will not have to become Amazon experts in order to support their customers in the Cloud. The Sage service operations team will provide operational support for the customer environment so partners can focus on helping their customers be successful.

Anytime Learning training will be available for Sage SalesLogix business partners in the Phase 1 timeframe and will include some of the following topics: understanding the cloud tool set, partner implementation guidelines, supporting customers in the cloud, and guidelines for customizations and upgrades.

Certification is required to receive support. Training includes an Anytime Learning course and online assessment that will be offered to partners at no charge.

## **Sales Tools & Other Resources**

For the Phase .5, the following tools are available now to assist you in selling and marketing the cloud edition. These documents will be updated and others added as we reach other phases.

- Sage SalesLogix Reference Guide (this document)
- Sage SalesLogix In the Cloud datasheet
- Technical Webinars
- Two recorded Webcasts with program highlights

Partners: Please visit Partners Online>Product Information>SalesLogix in the Cloud page.

Sage Sales Team: Please visit [eTeam](#).

## **Frequently Asked Questions**

### **Q: What are the main reasons a customer would want to move their CRM solution in the cloud?**

A: Having Sage host software and hardware in the cloud for businesses helps them minimize IT costs and involvement since Sage provides world-class support for them. Cloud solutions are also appealing because they eliminate capital expenditures with flexible, subscription-based purchase options.

### **Q: Does the cloud solution include both LAN and Web?**

The cloud solution is available for the Web Client, only. The disconnected Web Client will be available in future phases.

### **Q: How will hot fixes and upgrades be applied?**

A: Customers will be able to control the time frame when upgrades/hot fixes take place. Partners will apply upgrades and hot fixes, but the Sage service operations team will be available for assistance.



**Q: Is my data secure?**

A: Yes, the environment has been setup with numerous security measures such as SSL, locked down firewall ports, and a hardened Windows OS.

**Q: If Sage is hosting this for my customers, will I have access to their environments to customize?**

A: Yes, partners will have remote desktop access to the environment.

**Q: Will we be able to have multiple databases in the cloud for development and testing?**

A: Yes, Sage will support this need.

**Q: How would this work for verticals that are built on the SalesLogix platform? Are we able to create a custom image that can be copied to new instances?**

A: Yes, you will be able to create custom images. Sage sees this as one of the big advantages of this solution, and it provides a great opportunity for you.

**Q: Are there any issues with licensing Microsoft Windows OS and Office?**

A: No. Windows licensing is included in the offer, and MS Office licensing will happen at the client machine.

**Q: In Phase 0.5, how do you maintain the operating environment? Is it through the RDP connection?**

A: Yes, Sage will perform backups, monitoring, and some aspects of DB and OS maintenance. The partner will access through RDP to do customizations, data migrations, etc.

**Q: I have a customer interested in signing up. What do I do?**

A:

**Sage Sales Team**

Please follow these steps:

- Step 1: Early in the Sales Cycle, verify that the customer meets the Phase 0.5 program requirements:
  - Minimum 5 and maximum 200 users
  - Complete Phase 0.5 application
  - Submit the application to Tyler Crowder
  - Customer is Approved for Phase 0.5
- Step 2: When deal is closed, complete the SalesLogix in the cloud order form and submit to Sales Operations.
  - Customer must sign the Order form as well as the Phase 0.5 Customer Agreement

**Sage Business Partners**

- BP nominates customer early during sales process through their RAM/RSM. Your RAM/RSM will help you to complete the application process.
- Sage approves customer
- Partner continues to work the deal
- Customer signs customer agreement when deal is closed