

**SUNTICO
DATA DELIVERY
& PLATFORM**

SAS VIA CLOUD

**ATLAS + PARDOT + PEP + ELOQUA + WEBTRENDS
CUSTOMER TRACKING AGGREGATE:
RELEVANCE + BUSINESS INTELLIGENCE
+ PREDICTIVE ANALYSIS**

MOBILE



- Triggers
- Notifications
- Live Chat
- Apps

SAGE DESKTOP + SAGE ADVISOR DOCK



**CUSTOMER SAGE ADVISOR PAGE
for Desktop Applications and SageOne**

**USER ID
CAPTURED**

https://SageAdvisor.com/Sage50/UserID=x

Customer Alerts

Data Viz. KPIs & Reports

Guidance

Sage Credits

Connected Services

Apps / Plug-Ins

Maintenance



FINANCIAL PORTAL

Stage utility, services, and marketplace @ dynamic, targeted, meaningful content,
Secure, guide, and connect experiences. Maximize awareness, growth and revenue for Customers, Sage & Sage Partners.

PROPRIETARY BROWSER?

Sage custom browser or Web/OS hybrid experience?
Browser partnership? SEO magnet?



Security & dev. advantages: opportunities vs. limitations?



EMERGING MARKETS

Serve & Guide emerging markets. Realize a true global brand. Compete with Intuit on our terms.



**USER ID
CAPTURED**

https://SagePortal.com/UserID=x

Apps / Plug-In Usage

- Multi-Lingual
- Multi-Currency
- Inventory, etc.
- SageOne

Dev. Center / App Store

Connected Services

Financial Services

Dynamic Content

Premium Ad Space
Targeted, Relevant
Premium Ad Space
Targeted, Relevant
Premium Ad Space
Targeted, Relevant
Premium Ad Space
Targeted, Relevant

A Conceptual Feature System

- **Notifications**
- **Sage Advisor Dynamic Customer Page for Sage Desktop Products**
- **Cloud-enabled Customer Data Visualization & Reports**
- **Sage Credits**
- **Sage Advisor Customer Page to Guide and Monetize Sage One**
- **Sage Financial Portal: Apps, Financial & Content Channel**
- **Multilingual / Multicurrency Web App & Emerging Markets**
- **Custom Browser Investigation**
- **Sage Advisor Dock for Sage Desktop Products**

Introduction: Sage, Sage Advisor, Cloud & Web Dynamics

As Sage directs more of the customer experience to web and mobile spaces, Sage Advisor observes and guides that experience through triggers, notifications, live chat, and also by extending functionality beyond the desktop through web and mobile apps.

By moving customer data to the cloud, Sage bridges the gap between the desktop and online platforms, providing an unprecedented level of responsive service and value through the experience of dynamic feedback.

Tracking, B.I. and Predictive Analysis

We can understand and cultivate the customer experience because it can be traced from the time they consider purchasing a Sage product, to installation, and throughout the progression of their business as it grows. Creating this intimate customer portrait allows us to offer meaningful and timely feedback that makes a difference to their business. For Sage, it means our efforts to provide services are measurably proficient and appreciated. It also means we can anticipate where our next efforts will matter most.

Notifications & The Sage Advisor Customer Page

Notifications can instantly address support issues, security concerns, and conditions surrounding a customer's business by offering solutions and making recommendations.

Once data is moved to the cloud, desktop and mobile notifications can alert customers to view an online Sage Advisor page offering a range of dynamic, personalized feedback, gathered and accessible in one place – all without ever launching the desktop application.

Dynamic, cloud-enabled technology allows customers to invoke Alchem-X style data visualizations and reports for the most current snapshot of their business, and brings awareness about how they are relating to the product.

Sage Advisor can then follow through by offering related guidance in the form of videos or downloadable cheat sheets to suggest better workflows or best practices. Or for advanced training, customers can be referred to Sage University.

Sage Credits

Over time, customers who act on such recommendations may receive credits that can be applied towards purchases of connected services, or apps that extend beyond the limits of the desktop. Recommendations might also include browser plug-ins that provide additional functionality.

...And of course, there's always **maintenance (recommendations on Customer Pages)**.

Sage One & The Sage Advisor Customer Page

The same kind of user page can also serve Sage One customers to offer guidance, expand functionality, and generate revenue through a combination of dynamic content and targeted sponsorships such as Lynda.com, Adobe, and the Apple Store.

NOTE: Like Facebook or Adobe sites, users remain logged into their Customer Page accounts and unless they get onto another computer they remain logged in and tracked.

Sage Financial Portal

NOTE: What currently resides on SagePortal.com? The site exists, and is marked as unavailable due to maintenance.

Use and purchase of web or mobile apps can introduce other relationships if hosted in the form of a Sage Financial portal environment.

Here is the customer workspace on the web. In conjunction with cloud services, key functionality such as multi-lingual and multi-currency conversion can be delivered quickly and easily with existing web tools.

NOTE: Multilingual / multicurrency conversion apps can be easily developed with existing web tools, and should include the languages of the BRICS markets, including Portuguese, Russian, Hindi, Mandarin, Afrikaans, Arabic, and all related currencies.

Other Sage applications including Sage One can be introduced as well, and partners and developers can find opportunities in this highly targeted, captive marketplace. The portal can be further monetized through sponsorships modeled on Google Ads.

Connected and financial services can be promoted prominently, possibly eliminating steps from the customer experience, while generating revenue and building relationships.

Content is King

As both a workspace and a destination, the Sage Financial Portal will host dynamic content that speaks to customers on the issues that concern them – expert interviews, trends & forecasts, product reviews, the latest best practices and fundamentals of running and growing a small business, and awareness about how to interact and conduct business with customers abroad.

The 2012 CFO Roundtable videos examine how the emerging markets represent opportunities for small businesses and for Sage. These videos are the caliber of expert interviews that belong on the Sage Financial portal.

By securing, guiding, and connecting related experiences, all participants will share in the many benefits of an extraordinarily focused ecosystem.

Sage Proprietary Browser

Could such a scenario benefit from a custom browser? Many browser and web-operating system hybrids are available that may be worth exploring. While a dedicated browser may impose limitations, it may also represent special opportunities and advantages relative to hosting extended functionality, and within the context of a financial portal. The premise may also be of interest to key partners such as Google or Mozilla who could bring more value to our customers.

Sage & Emerging Markets

Ultimately, as Sage turns the corner with a rebrand and reaches for the cloud, the call for new customers is answered en masse through the rise of the emerging markets. Over half of all inquiries about Sage products are from overseas, from people who apparently work around our product limitations.

Sage can cater to customers abroad through such extended online capacities, and through Sage Advisor, can guide small businesses in the East who are seeking to understand and adopt Western practices to achieve success.

Sage Advisor Dock

Customers can invoke the complete suite of extended functionality and guidance instantly through the Sage Advisor Dock.

The Dock is a taskbar-like desktop utility that launches the Sage Advisor Customer Page, the Sage Financial Portal, and the Sage Advisor Guidance Media page, which includes links to Support, the User Community, and the Knowledge Base.

Also from the Dock, Customers can directly request support through Live Chat. And, they can add shortcuts to the workspaces they use most.

The Sage Advisor Dock will be available in all Sage desktop products to complement online resources, and to accompany customers throughout their workflow.

Custom Browser Links

Customizable social media browser

<http://www.rockmelt.com/>

Webian Shell

http://youtu.be/gG_mATRHm3M

<http://webian.org/shell/>

Mozilla's chromess browser is no longer an active project

<https://mozillalabs.com/en-US/chromeless/>

BYOB

<http://www.w3.org/QA/2008/09/build-your-own-browser.html>

Data Visualization and Predictive Analysis Tool Recommendations:

A friend who is formerly with JWAC (<http://www.jwac.mil>) is now supporting European Command in Stuttgart, Germany through Booz Allen Hamilton as a senior analytics consultant specializing in machine learning (AI). He recommended the following tools with comments below:

A standalone open source tool:

GGOBI <http://www.ggobi.org/>

GGOBI can work in conjunction with R which is also open source.

R is also extremely adaptable w/ loads (hundreds, perhaps thousands) of add-on command libraries called "packages." (type "demo(graphics)" no quotes at the prompt and hit <enter> to see a sample.

<http://www.r-project.org>

Mathematica and Matlab are the high end;

URL to free 15-day:

trial: <http://www.wolfram.com/mathematica/trial/>

Matlab 30-day trial:

http://www.mathworks.com/programs/nrd/matlab-trial-request.html?s_cid=adw_na_search_matlab_trial8

Octave is an open-source possibility (very similar to Matlab, but free):

<http://www.gnu.org/software/octave/>

All of these provide packaged solutions and a great deal of flexibility through programming.