

# Mobile CRM and Sugar Mobile

## The Power of Innovation and Value



# About SugarCRM

- Fastest growing provider of CRM software
- 2<sup>nd</sup> largest user base of any CRM system with above 1.5 users in 120 countries
- Founded in April 2004 with headquarters in Silicon Valley
- 400+ employees worldwide
- Recognized CRM leader by industry analyst firms



We put the “i” in


CRM



 SUGARCRM.

# The Case of the Missing Zero

# CRM Market: The Case of the Missing Zero

2000  
Billion Users 

# Why?

- CRM solutions were designed for the manager
- Not for the user
- Not available through any device:  
**Mobile not a core strategy**



# Mobile CRM Best Practice

**No.1**

**Understand objectives of the Mobile Strategy**

**No.2**

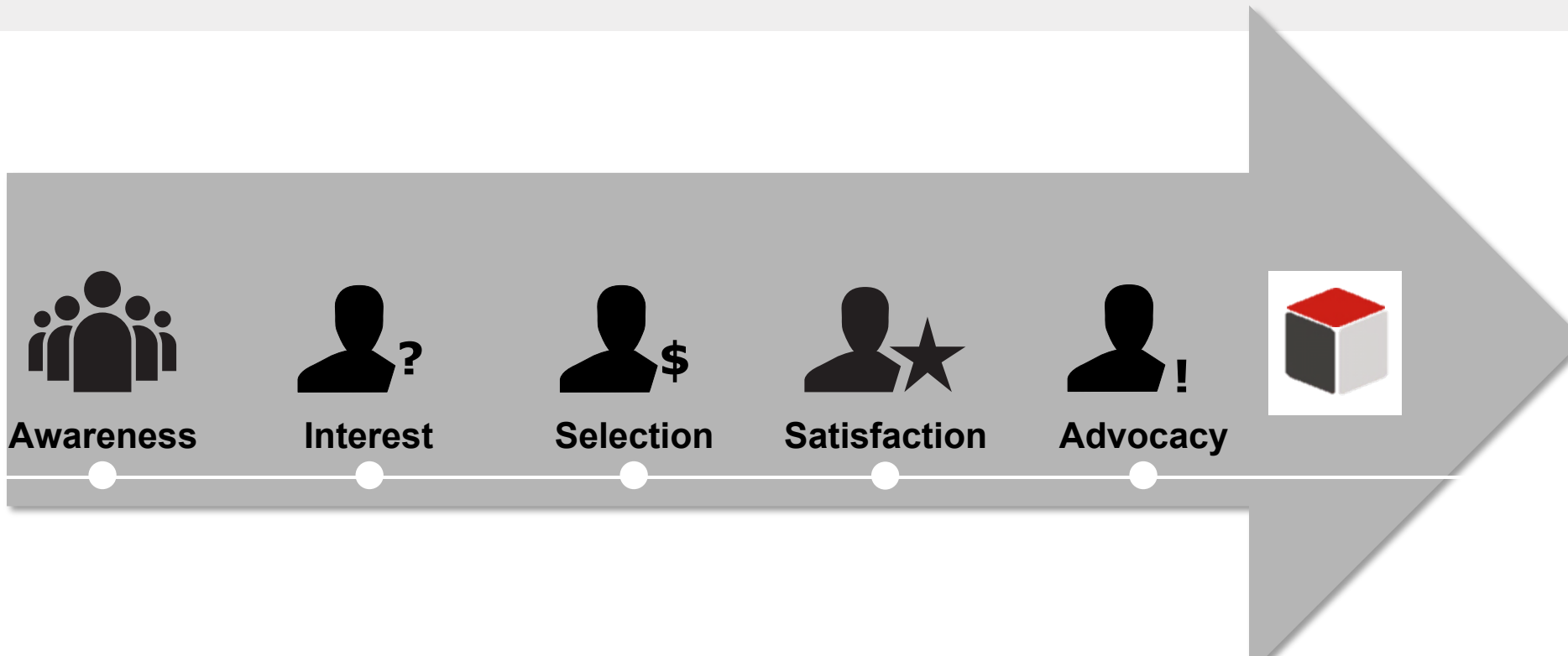
**Understand user's need, and roles**

**No.3**

**Choose the right technology and plan your implementation**

Source: SugarCRM/Harris Interactive Survey 2012

# Mobile CRM Lifecycle



Why Mobile CRM – What can challenge adoption? – Who decides? - Are users involved? – Champion for use



# Unified Mobile Experience

The image illustrates the unified mobile experience of SugarCRM. It shows two views of the same system: a desktop view on the left and a mobile view on the right, connected by a double-headed arrow.

**Desktop View (Left):**

- My Calls:** A table with columns: Close, Subject, Related to, Start Date, Accept?, Status. It lists three items, including "Discuss review process" and "Left a message".
- My Meetings:** A table with columns: Close, Subject, Related to, Start Date, Accept?. It lists three items: "Initial discussion" (Waverly Trading House), "Review needs" (Powder Suppliers), and "Follow-up on proposal" (Powder Suppliers).

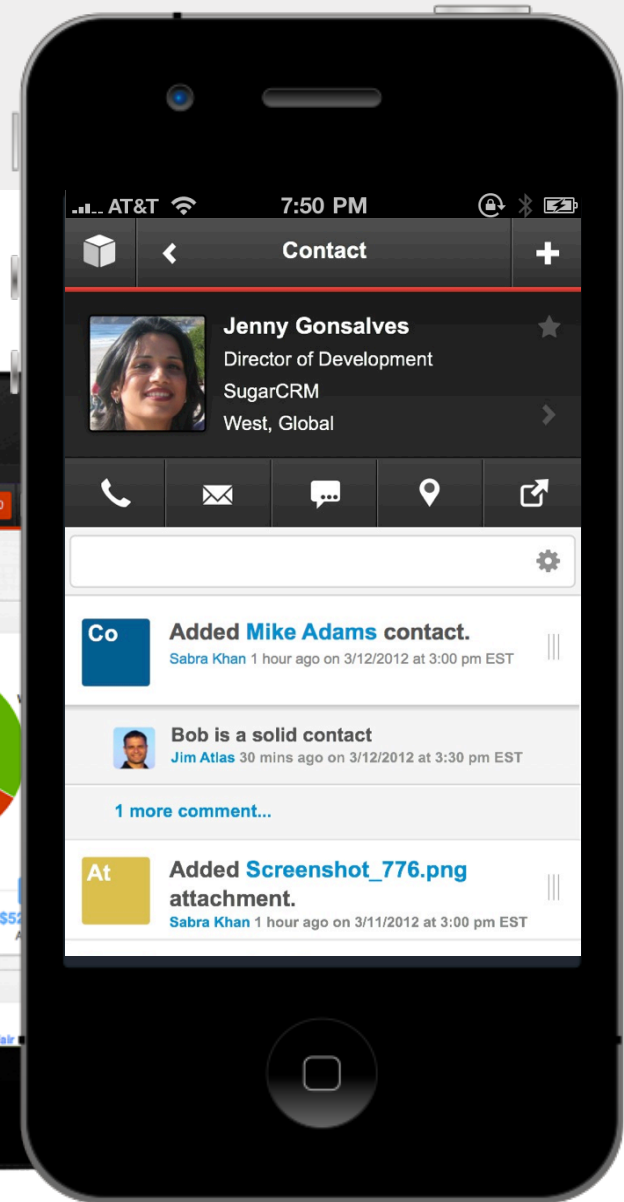
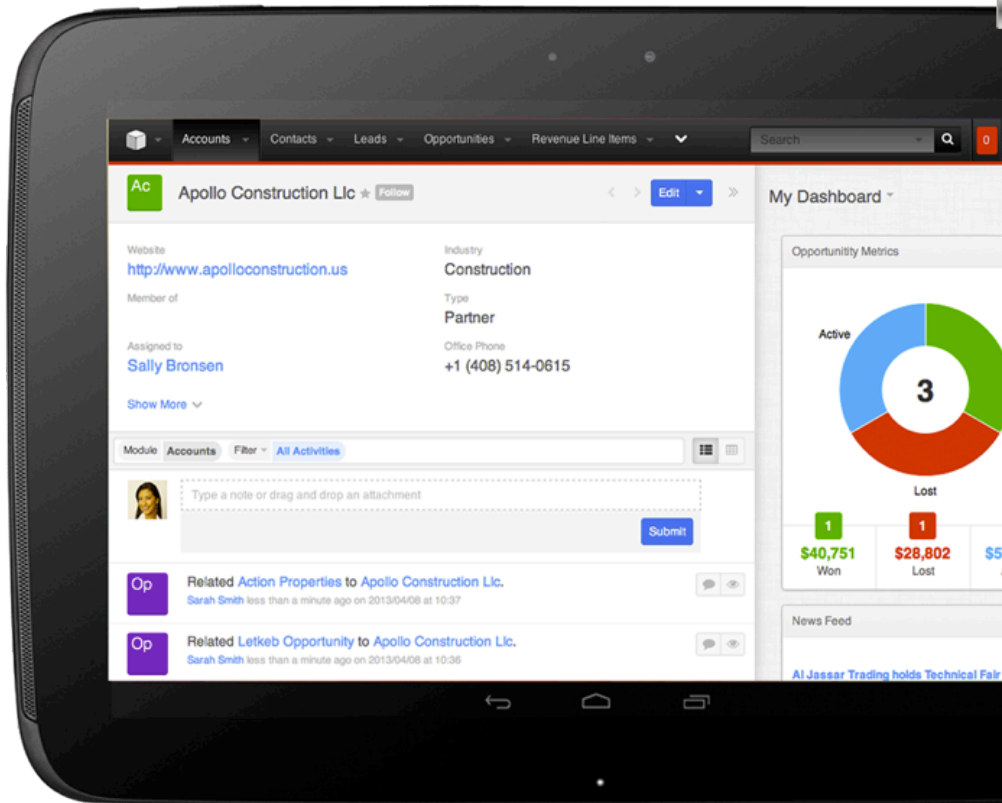
**Mobile View (Right):**

- My Activity Stream:** A list of activities for user Jim, including "a new contact" (Glen Bastian), "a new case" (Need assistance with large), and "Warning message when using the wrong browser for".

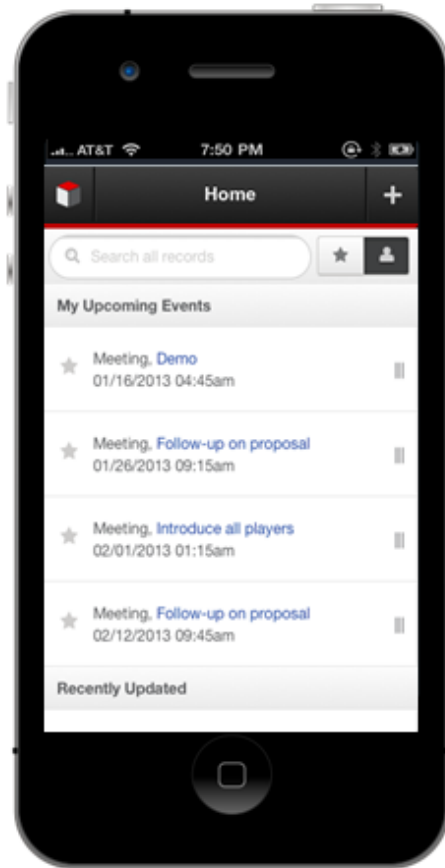
**Navigation and UI Elements:**

- Top navigation: Calendar, Calls, Meetings, Tasks, Notes, Reports, More.
- Search bar and user profile: Search, Jim Brennan.
- Dashboard tabs: My Sugar, Sales, Marketing, Support.
- Footer: SUGARCRM logo, © 2012 SugarCRM Inc., A Tour, Home Help.

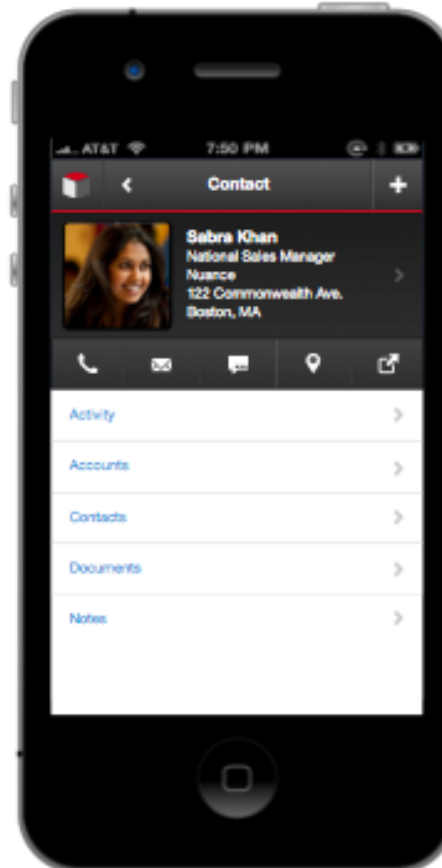
# How it looks: Unified Mobile Experience



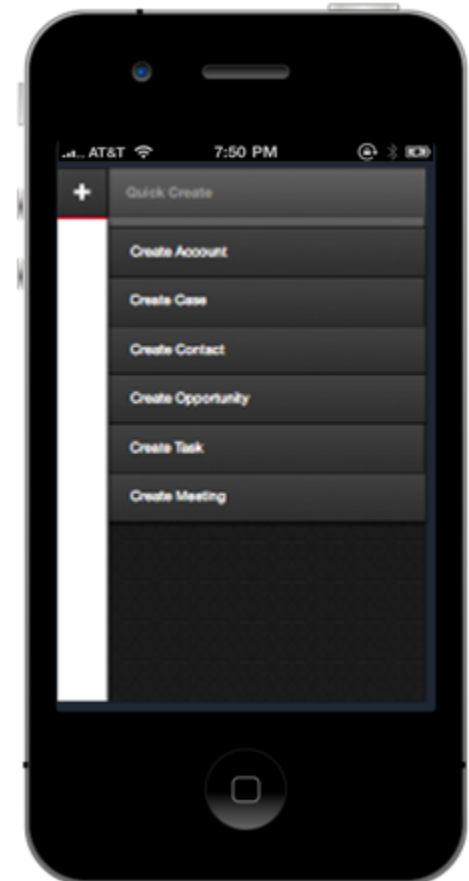
# Mobile Interface



**Intuitive interface including  
Search and Filtering**



**Access to key  
information**



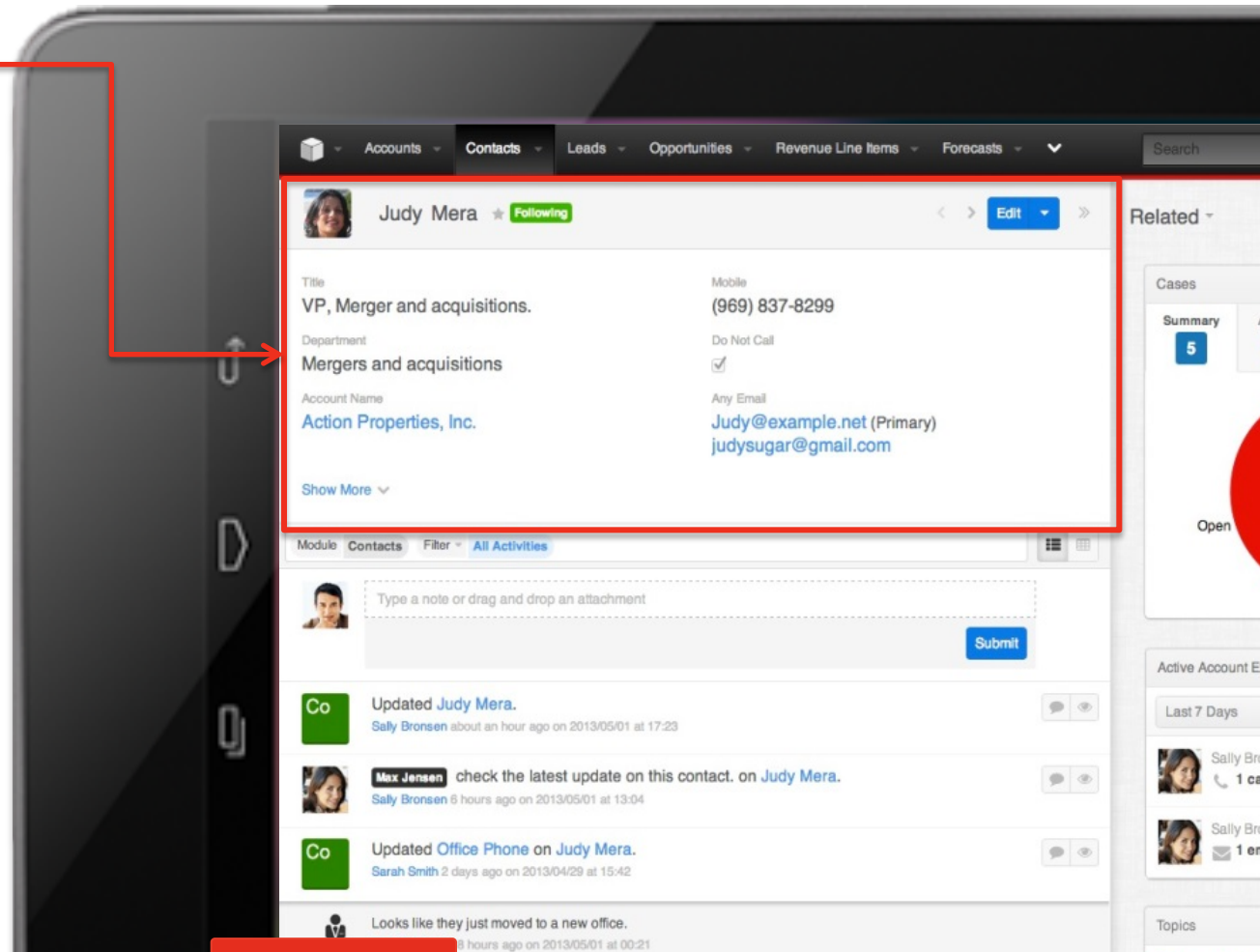
**Complete record  
administration**

# Sugar UX

## Transformative, Individualized, Immersive

### Context Panel

- Sets the Context
- Business Card View of a contact
- List View – overview of opportunities, cases and campaigns



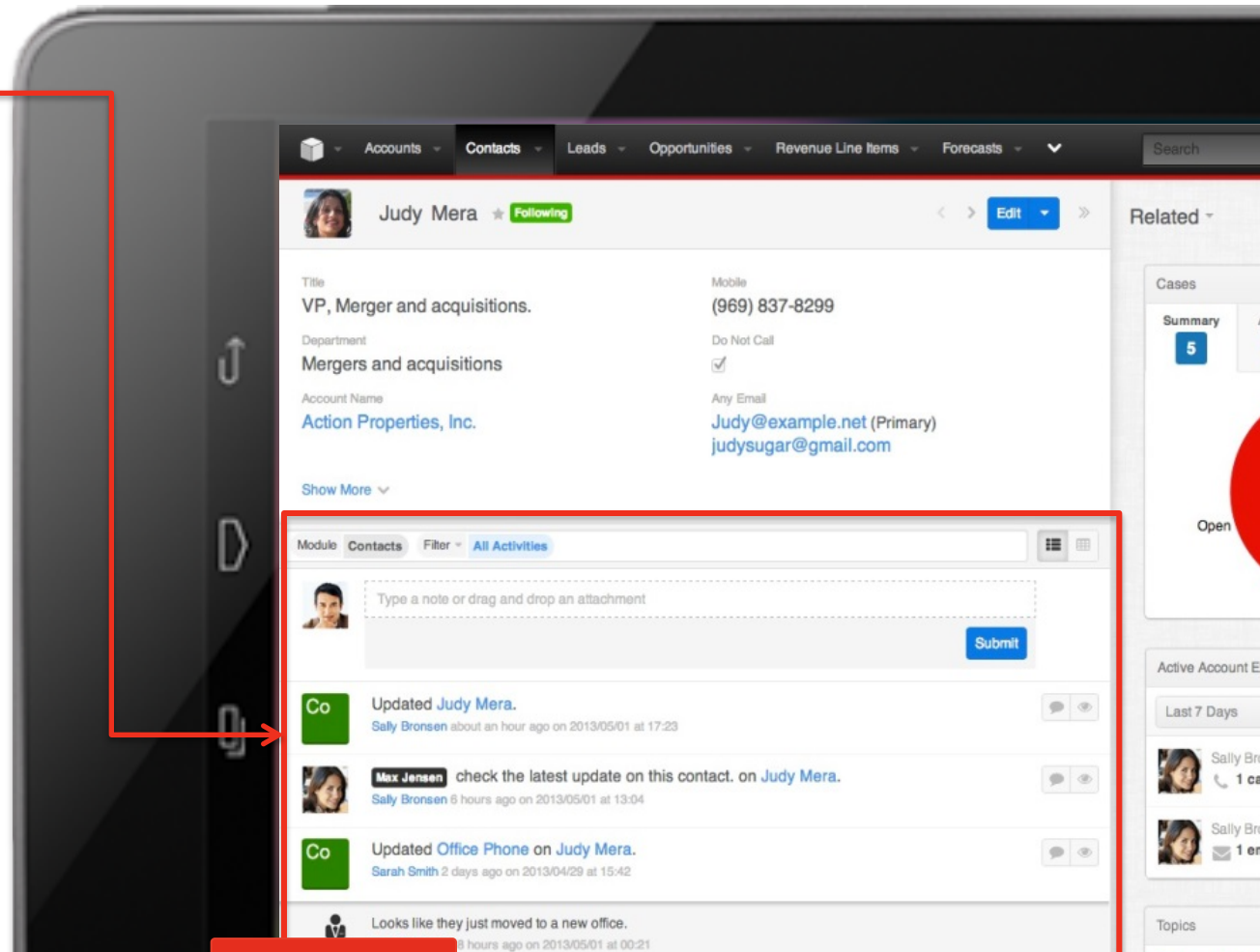
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# Sugar UX

## Transformative, Individualized, Immersive

### Collaboration Panel

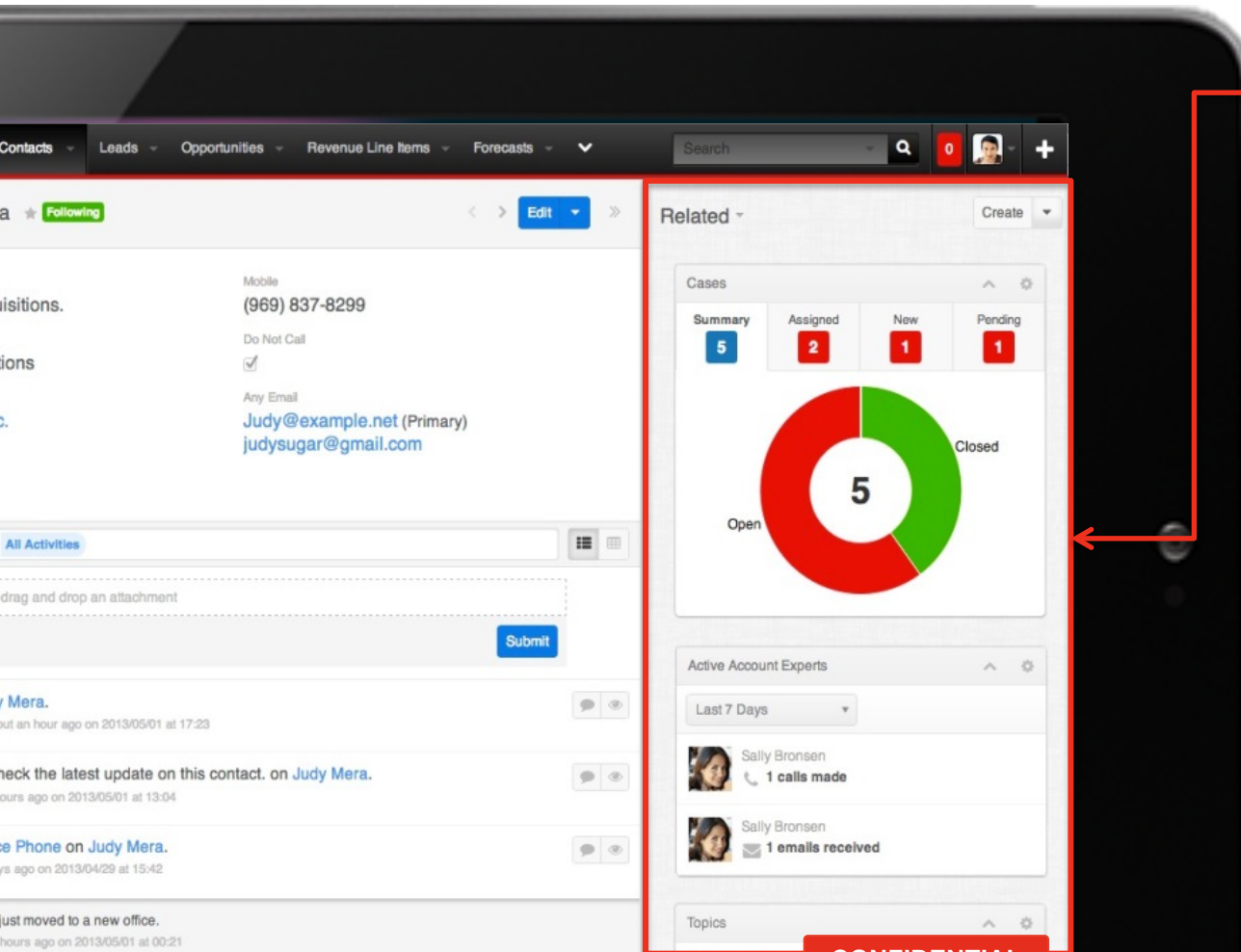
- Context-sensitive activity streams
- Quickly see and share what's most relevant in context
- Real-time updates from other Sugar users and system event notifications
- View, share and collaborate around related documents



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# Sugar UX

## Transformative, Individualized, Immersive



### Intelligence Panel

- Aggregates relevant data in context
- Internal systems view: accounting, supply chain
- External data sources: D&B, Twitter, websites
- Personalizable for user role or individual needs
- Real-time alerts

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# How to try it?



**1. Sign up for a free trial of Sugar:**

**<http://www.sugarcrm.com/>**

**2. Download the app for your device:**

**<http://www.sugarcrm.com/mobile>**



# Successful Customers

