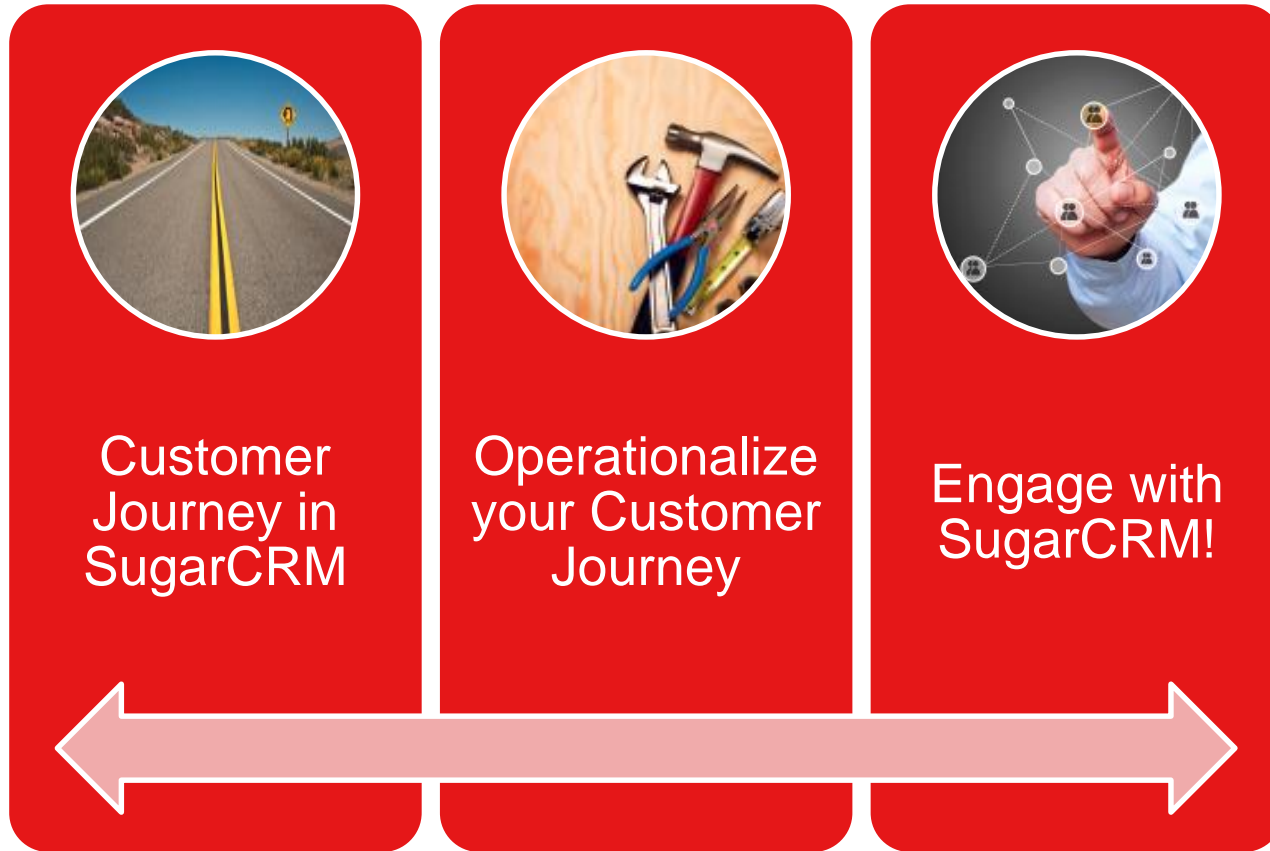


# SUGARCRM CUSTOMER JOURNEY INTRO

# Our Journey for Today



# Functional Taxonomy

Awareness : Knowledge : Consideration : Selection : Buying : Satisfaction : Retention / Loyalty : Advocacy

**Lifecycle**

Find New Business  
(Target Segmentation)

Deliver Product / Service

Retain Customers

Upsell & Cross-Sell

**Business  
Challenge**

Operational Efficiency

360 Degree Customer View

Increase # MQL

Accelerate  
Lead  
Conversion  
(SRL)

Accelerate velocity  
through sales  
funnel

Increase  
win rate

Deliver On-  
Time

Maintain SLA

Reduce TTRes

Increase # sales gen leads

Increase Forecasting  
Accuracy

Reduce Case Load

**Functional  
Goals**

Maintain Regulatory and Internal Compliance

Marketing: Demand Generation, Lead Development Rep, Prod Mktg

Sales: Inside Sales Rep, Outside Sales Rep, Sales Mgr  
Sales Ops, Account Mgr

Delivery / Operations / Support  
Delivery: Order / Prod/ Svc Fulfillment  
Project/Ops Mgr, Prof Svcs, Field Service Engineer  
Support: CSR, Help Desk, Support Mgmt

**Supporting  
Team**

Cam-  
paigns

Lead Mgmt:  
Lead Gen  
Lead Scoring  
Lead Nurture

Sales  
Dev

Pipeline  
Mgmt

Oppty.  
Mgmt

Terr.  
Mgmt

Perf.  
Mgmt

Fore-  
cast

CPQ

Ticket Mgmt

Contact Center

Self Service  
Portal

**CRM  
Functionality**

Workflow

Dashboard, Reporting, Analytics

Contact and Account Mgmt : Collaboration : Broad Database support : PIM (including plug-ins) : Document Repository : Workflow : Personalization :  
Configuration and Customization Tools : Security and Roles : Project Mgmt : Integration Layer (API and ETL) [including plug-ins] : Internationalization :  
*Data Quality : Master Data Management*

**Platform  
Capability  
(on all devices)**

# Create Extraordinary Customer Relationships

Transform from Inside Out

## CUSTOMER JOURNEY ORIENTATION

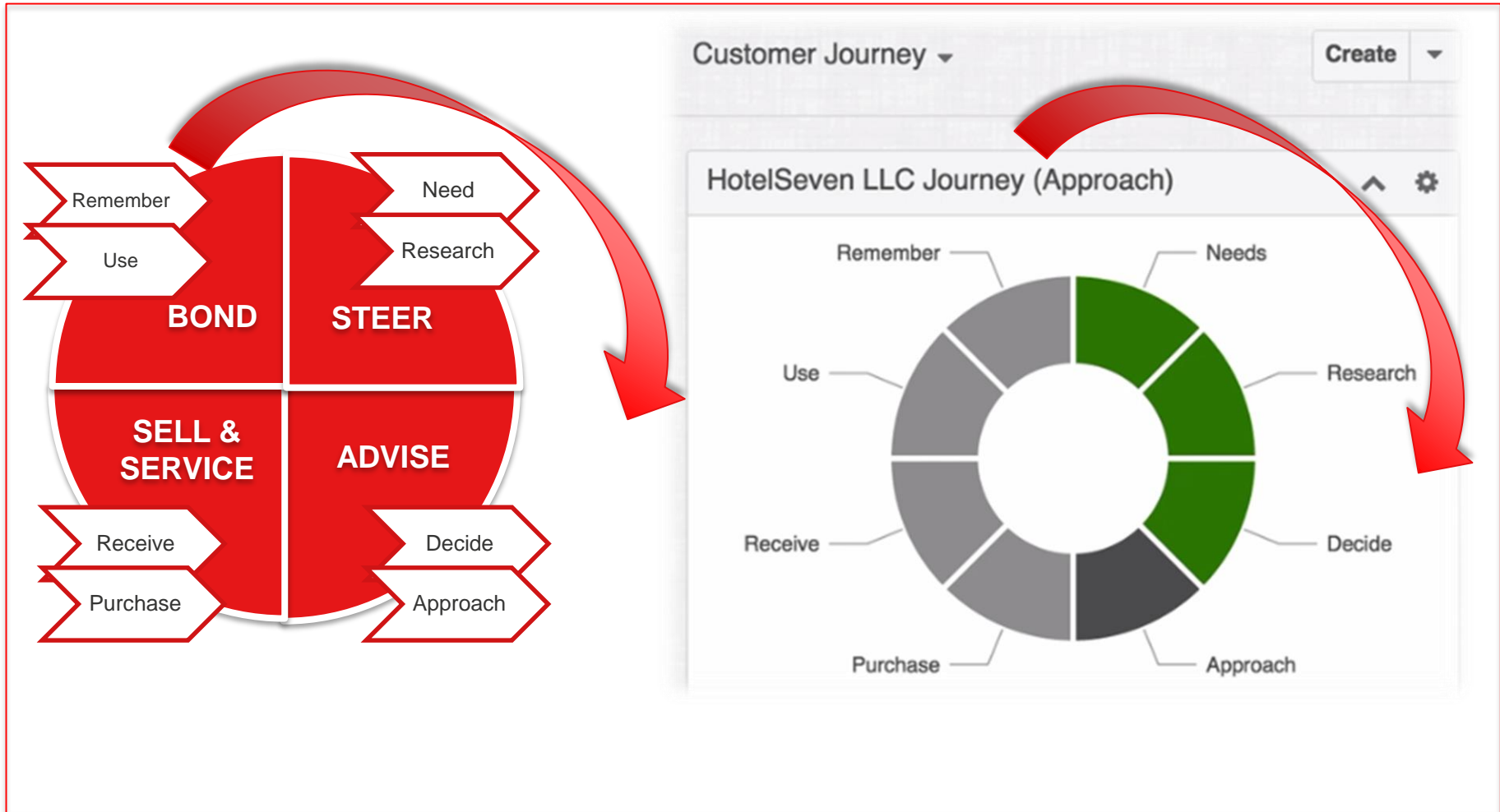


## MAKE IT SIMPLER – CUSTOMER VIEW



# Customer Journey in Practice

## SugarCRM – Customer Journey Solution Overview



# Customer Journey in Practice

## SugarCRM – Customer Journey Solution Overview



The screenshot shows the SugarCRM interface. The navigation menu at the top includes Accounts, Contacts, Opportunities, Calendar, Leads, Reports, Quotes, and Documents. The 'Contacts' menu item is highlighted with a red box. A dropdown menu is open under 'Contacts', with 'Build A List' highlighted by a red box. Below the navigation, there are two bar charts. The left chart, 'Leads by City', shows leads for Chicago. The right chart, 'Leads By Title', shows leads for CEO, CIO, CMO, and VP Sales.

City	Leads
Chicago	15
Other City 1	15
Other City 2	13
Other City 3	15

Title	Leads
CEO	19
CIO	17
CMO	21
VP Sales	15

# Customer Journey in Practice

## SugarCRM – Customer Journey Solution Overview



My Dashboard » Home » S1 x Anwsa

D&B Build A List

Reset D&B: Build A List Preview

Segment and Prepare your audience

- ✓ People : Job Function:Owner
- ✓ Company Location : City:San Francisco , States:CA
- ✓ Industry : NAICS Code:721110
- ✓ Company Size

Annual Sales: Greater than or Equal to [ ] + [ ]

Number of Employees: Single Site Between [ ] and [ ] +

Between 10 and 200

Total Employee Growth %: Greater than or Equal to [ ] + [ ]

Market Cap: Greater than or Equal to [ ] + [ ]

5 Company Information

6 Financial Information

7 IPO Data

Contacts (31)

- Simon Sin  
Cova Hotel  
Owner
- Fred Maionchi  
FRED E MAIONCHI  
Owner
- Cynthia Roman  
Bhr Operations, L.L.C.  
Owner
- Domnick Maionchi  
Laluna Inn  
Owner
- James P Edmondson  
HOWARD JOHNSON AT TH  
Owner
- Elizabeth Dmello  
IHMS (SF) LLC  
Owner
- Samantha Felix  
Hotel Des Arts  
Owner

Show More D&B Search Re



# Customer Journey in Practice

## SugarCRM – Customer Journey Solution Overview

Needs

Create Persona ✓

Segment Market ✓

Distribute Content

Email

Create your Audience List

Contacts (31)

Simon Sin  
Cova Hotel  
Owner

Fred Maionchi  
FRED E MAIONCHI  
Owner

Cynthia Roman  
Bhr Operations, L.L.C.  
Owner

Domnick Maionchi  
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Owner

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HOWARD JOHNSON AT THE WHARF  
Owner

Elizabeth Omello  
IHMS (SF) LLC  
Owner

Samantha Felix  
Hotel Des Arts  
Owner



# Customer Journey in Practice

## SugarCRM – Customer Journey Solution Overview

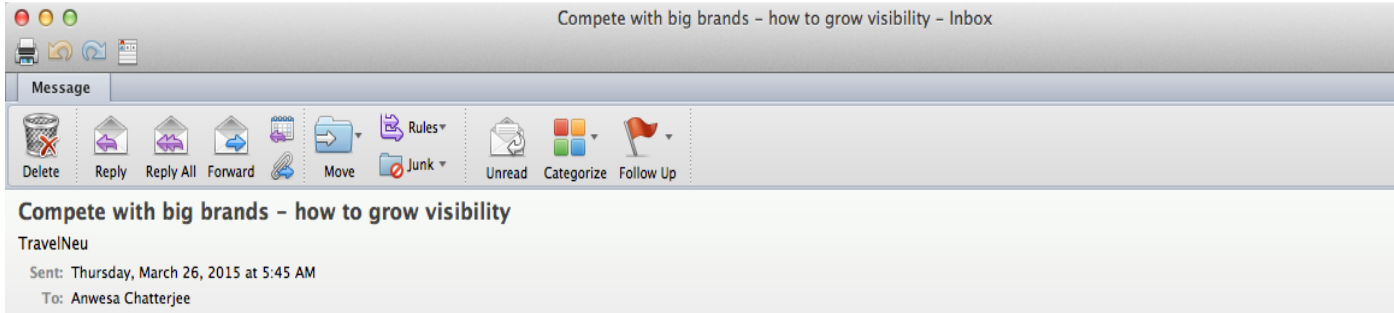
Needs

Create Persona ✓

Segment Market ✓

Distribute Content ✓

Email ✓



Dear Mary,

We know small boutique hotels have numerous challenges reaching a wider traveler audience. Perhaps that's why HotelSeven ranked high in customer satisfaction but low in consumer awareness in a recent TravelNeu survey.

However, it is possible to get noticed, create customers for life and beat out the big chains – without beating up your wallet.

Tune in to our executive podcast aimed specifically at small chain operators.

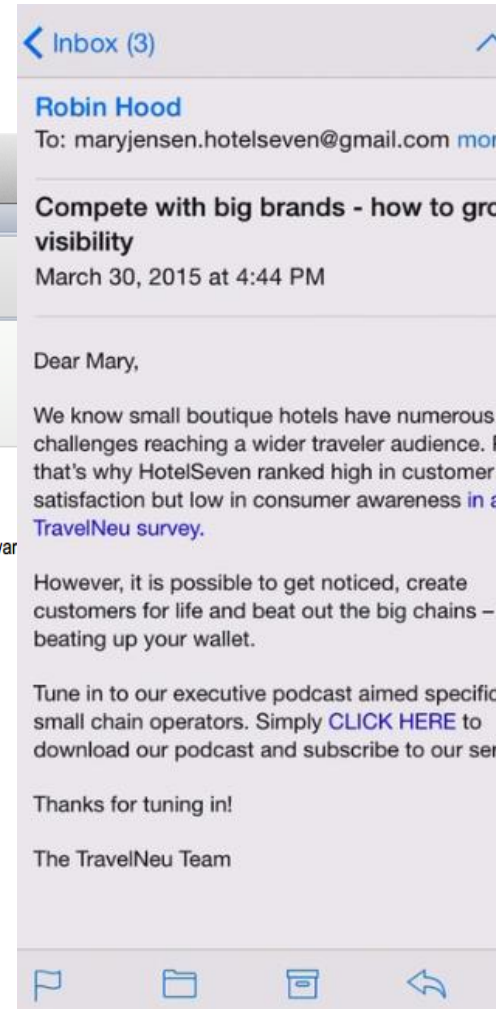
Simply [CLICK HERE](#) to download our podcast and subscribe to our series or [reply](#) to this email if you have additional questions.

Thanks for tuning in!

The TravelNeu Team

If you don't want to receive this kind of emailing in the future you can, at any time, to unsubscribe [here](#).

Publish Content → Email, Newsletter, Website, Social media etc...



# Customer Journey in Practice

## SugarCRM – Customer Journey Solution Overview



Co Ms. Mary Jensen ☆ Follow Edit >>

Business Card Show More Contact Insight



### Contact Insight

Engaged in Programs: 0 [Add Contact To Program](#)

### Messages

Compete with big brands - how to gr 5 Days Ago

[View All Messages](#)

### Actions

- Responded to Email offer  
Mailing: Compete with big brands - how to gr 6 Days Ago
- Responded to Email offer  
Mailing: Compete with big brands - how to gr 6 Days Ago
- Visited TravelNeu website  
Mailing: Compete with big brands - how to gr 03/26/2015
- Visited TravelNeu website  
Mailing: Compete with big brands - how to gr 03/26/2015

[View All Actions](#)

Inbox (3)

**Robin Hood**  
To: maryjensen.hotelseven@gmail.com [more...](#)

**Compete with big brands - how to grow visibility**  
March 30, 2015 at 4:44 PM

Dear Mary,

We know sr... challenges... that's why H... satisfaction... TravelNeu s...

However, it is possible to get noticed, create customers for life and beat out the big chains – without beating up your wallet.

Tune in to our executive podcast aimed specifically at small chain operators. Simply [CLICK HERE](#) to download our podcast and subscribe to our series.

Thanks for tuning in!

The TravelNeu Team

Consume Content

# Customer Journey in Practice

## SugarCRM – Customer Journey Solution Overview

Decide

Decision  
Makers

Demos

Other  
collateral

Op HotelSeven Premium Listing ☆ Following Edit >> Customer Journey Create

Business Card Show More

Account Name: HotelSeven LLC Customer Stage: Decide

Expected Close Date: 2015-12-31 Likely \$36,000.00

Related All Filter All Records Search...

Co Contacts

Responsible For	Name	Title
General Management	Ms. Mary Jensen	Owner
Marketing Manager		
Finance Manager		

Ts Tasks

Subject	Status	Contact	Start Date	Due Date	As
Send Eval Link	Not Started		2015-04-10 08:28	2015-04-10 08:28	Sic
Call Finance Manager	Not Started		2015-04-09 08:28	2015-04-09 08:28	Sic

HotelSeven LLC Journey (Decide)

Identify Financial Manager and Marketing Manager

Send Eval Link

SUGARCRM Mobile Shortcuts Tour Feedback Help Support

# Customer Journey in Practice

## SugarCRM – Customer Journey Solution Overview

Decide

Decision  
Makers

Demos

Other  
collateral

Op HotelSeven Premium Listing ☆ Following Edit >> Customer Journey Create

Business Card Show More

Account Name Customer Stage  
HotelSeven LLC Decide

Exp 20

Rel

Co

☆

☆

☆ Finance Manager

Ts Tasks

	Subject	Status	Contact	Start Date	Due Date	As
☆	Send Eval Link	Not Started		2015-04-10 08:28	2015-04-10 08:28	Sic
☆	Call Finance Manager	Not Started		2015-04-09 08:28	2015-04-09 08:28	Sic

HotelSeven LLC Journey (Decide)

Remember Needs Research Approach Purchase Receive Use

Decide

Ts Identify Financial Manager and Marketing Manager

Ts Send Eval Link

SUGARCRM Mobile Shortcuts Tour Feedback Help Support

- User **Reaction** to Content → Automatic **Lead** Generation → Automatic **Opp** Generation
- From a journey perspective the client is in „decide“ phase

# Customer Journey in Practice

## SugarCRM – Customer Journey Solution Overview

Decide

Decision  
Makers

Demos

Other  
collateral

Op HotelSeven Premium Listing ☆ Following Edit >> Customer Journey ▾ Create ▾

Business Card Show More

Account Name  
HotelSeven LLC

Customer Stage  
Decide

Expected Close Date  
2015-12-31

Related ▾ All

Co Contacts

Responsible For Name Title

☆	General Management	Ms. Mary Jensen	Owner	👁	▾
☆	Marketing Manager			👁	▾
☆	Finance Manager			👁	▾

Ts Tasks

☆	Subject	Status	Contact	Start Date	Due Date	Site	👁
☆	Send Eval Link	Not Started		2015-04-10 08:28	2015-04-10 08:28	Site	👁
☆	Call Finance Manager	Not Started		2015-04-09 08:28	2015-04-09 08:28	Site	👁

HotelSeven LLC Journey (Decide)

Ts Identify Financial Manager and Marketing Manager

Ts Send Eval Link

SUGARCRM Mobile Shortcuts Tour Feedback Help Support

- Based on Customer Stage & Journey → automatic generation of tasks



# Customer Journey in Practice

## SugarCRM – Customer Journey Solution Overview

Decide ✓

Decision  
Makers

Demos

Other  
collateral

HotelSeven Premium Listing ☆ Follow Edit >> Customer Journey Create

Business Card Show More

Account Name Customer Stage

HotelSeven LLC Journey (Decide)

- Remember
- Needs
- Research
- Decide
- Approach
- Purchase
- Receive
- Use

- Identify Financial Manager and Marketing Manager
- Send Eval Link

Subject	Status	Contact	Start Date	Due Date
Send Eval Link	Completed	Select Contact...	2015-04-10 08:54	2015-04-10
Call Finance Manager	Not Started		2015-04-09 08:54	2015-04-09

SUGARCRM Mobile Shortcuts Tour Feedback Help Support

- SugarCRM can detect which tasks have been performed
- Easy to guide even unexperienced sales people
- As the last task gets completed → we proceed to another stage of the journey

# Customer Journey in Practice

## SugarCRM – Customer Journey Solution Overview

The diagram at the top shows two parallel customer journey paths. The first path, labeled 'Decide' with a green checkmark, includes 'Decision Makers', 'Demos', and 'Other collateral'. The second path, labeled 'Approach', includes 'Contact Key Manager', 'Explain ROI Uplift', and 'Get sign-off'.

The screenshot below shows the SugarCRM interface for 'HotelSeven LLC Journey (Approach)'. The 'Customer Stage' is 'Decide'. A red box highlights a task: 'Get ROI Analysis Signed Off by General Manager'. A text box explains: 'As the last task gets Completed we move to the next stage'. The interface also shows a list of contacts and a task list.

**Account Name:** HotelSeven LLC  
**Expected Close Date:** 2015-12-31  
**Customer Stage:** Decide

**Related:** All Filter All

**Contacts**

Responsible For	Name	Title
General Management	Ms. Mary Jensen	Owner
Marketing Manager	Mr. Tim Hanft	Marketing Assistant Manager
Finance Manager	Ms. Erika Gomez	Sr. Finance Manager

**Tasks**

Subject	Status	Contact	Start Date	Due Date
Send Eval Link	Completed	Select Contact...	2015-04-10 08:54	2015-04-10 08:54
Call Finance Manager	Not Started		2015-04-09 08:54	2015-04-09 08:54

**Customer Journey (Approach) Donut Chart:**

- Remember
- Use
- Receive
- Purchase
- Approach
- Decide
- Research
- Needs

**Task:** Get ROI Analysis Signed Off by General Manager



# Customer Journey in Practice

## SugarCRM – Customer Journey Solution Overview

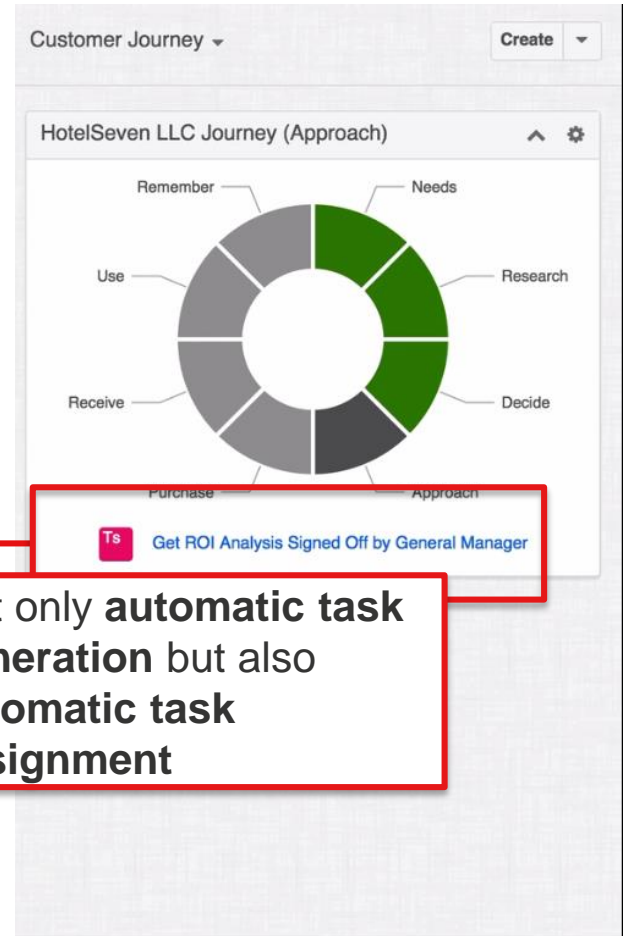
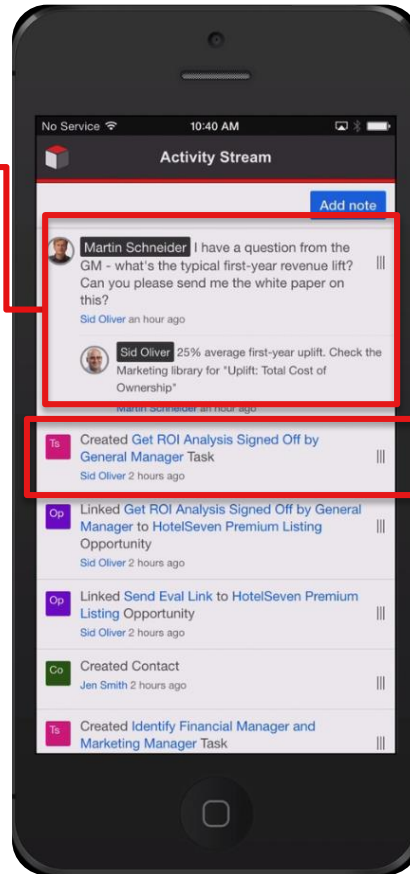
Approach

Contact  
Key  
Manager

Explain  
ROI Uplift

Get sign-  
off

✓ Break organizational silos with **Activity Stream** - effortless communication



✓ Not only **automatic task generation** but also **automatic task assignment**

# Customer Journey in Practice

## SugarCRM – Customer Journey Solution Overview

Approach ✓

Contact Key Manager

Explain ROI Uplift

Get sign-off

Op HotelSeven Premium Listing ☆ Follow Edit >>

Business Card Show More

Account Name  
HotelSeven LLC

Expected Close Date  
2015-12-31

Customer Stage  
Approach

Likely  
\$36,000.00

Related All Filter All Records Search...

Co Contacts

Responsible For	Name	Title
General Management	Ms. Mary Jensen	Owner
Marketing Manager	Mr. Tim Hanft	Marketing Assistant Manager
Finance Manager	Ms. Erika Gomez	Sr. Finance Manager

Ts Tasks

Subject	Status	Contact	Start Date	Due Date
Get ROI Analysis Sig	Completed	Select Contact...	2015-04-10 09:02	2015-04-10
Send Eval Link	Completed		2015-04-10 08:54	2015-04-10
Call Finance Manager	Not Started		2015-04-09 08:54	2015-04-09
Call Marketing Man	Not Started		2015-04-08 08:54	2015-04-08

Customer Journey Customer Journey Create

HotelSeven LLC Journey (Approach)

Remember Needs Research Decide Approach Purchase Receive Use

Ts Get ROI Analysis Signed Off by General Manager

✓ As the task is completed the journey stage automatically advances

# Customer Journey in Practice

## SugarCRM – Customer Journey Solution Overview



Op HotelSeven Premium Listing ☆ Follow Edit > Customer Journey ▾ Create ▾

Business Card Show More

Account Name  
HotelSeven LLC

Expected Close Date  
2015-12-31

Customer Stage  
Purchase

Likely  
\$36,000.00

Related ▾ All Filter All Records Search...

Co Contacts

Responsible For	Name	Title
General Management	Ms. Mary Jensen	Owner
Marketing Manager	Mr. Tim Hanft	Marketing Assistant Manager
Finance Manager	Ms. Erika Gomez	Sr. Finance Manager

Ts Tasks

Subject	Status	Contact	Start Date	Due Date	As
Close Deal	Not Started		2015-04-13 09:13	2015-04-13 09:13	Sik
Generate Quote	Not Started		2015-04-12 09:13	2015-04-12 09:13	Sik
Get ROI Analysis Si...	Completed		2015-04-10 09:02	2015-04-10 09:02	Sik
Send Eval Link	Completed		2015-04-10 08:54	2015-04-10 08:54	Sik

HotelSeven LLC Journey (Purchase)

Remember Needs Research Decide Approach Purchase Receive Use

Ts Generate Quote


Ts Close Deal

✓ The system is a guide for the person who is navigating through the system

# Customer Journey in Practice

## SugarCRM – Customer Journey Solution Overview

We put the “i” in  
**CRM**<sup>TM</sup>

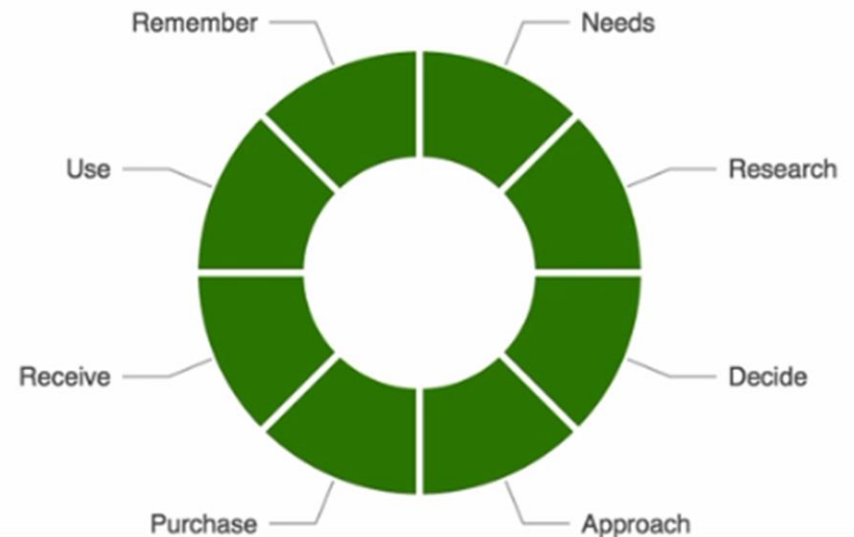


- ✓ Customer Journey – less theory and more Practice
- ✓ Need of extension of traditional CRM Function
- ✓ Process Driven System which is able to guide you through your journeys

Customer Journey Dashboard ▾

Create ▾

HotelSeven LLC Journey (Remember) ^ ⚙



# Continue to Engage with us on the Customer Journey!

**Attend customer journey workshop**

**Roadshow in major cities in**

- U.S., Latin America, Australia, Europe

**For on-site workshops**

- Email

**customerjourney@sugarcrm.com**

**Apply for follow-up engagement**

**Apply here:**

<https://www.surveymonkey.com/s/SugarCustomerJourney>

**Complete Discovery session**

- 1-2 hour
- Virtual meeting with customer success and product management

**Hold On-Site Workshop**

- Half-day to multi-day workshop
- Develop customized customer journey map and plan

# Engage with SugarCRM

## Customer Journey Workshops

May 12 – New York

May 14 – Chicago

May 21 – Costa Mesa

June 23 – Munich

June 25 – Frankfurt

September 17 – London

September 24 – Zürich

# Our Journey for Today





