Mobile CRM and Sugar Mobile

The Power of Innovation and Value

SUGARCRM

About SugarCRM

- Fastest growing provider of CRM software

- 2nd 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

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The Case of the Missing Zero

CRM Market: The Case of the Missing Zero

200

Million Users in

SUGARCRM

Why?

- CRM solutions were designed for the manager

- Not for the user

- Not available through any device: **Mobile not a core strategy**

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Mobile CRM Best Practice

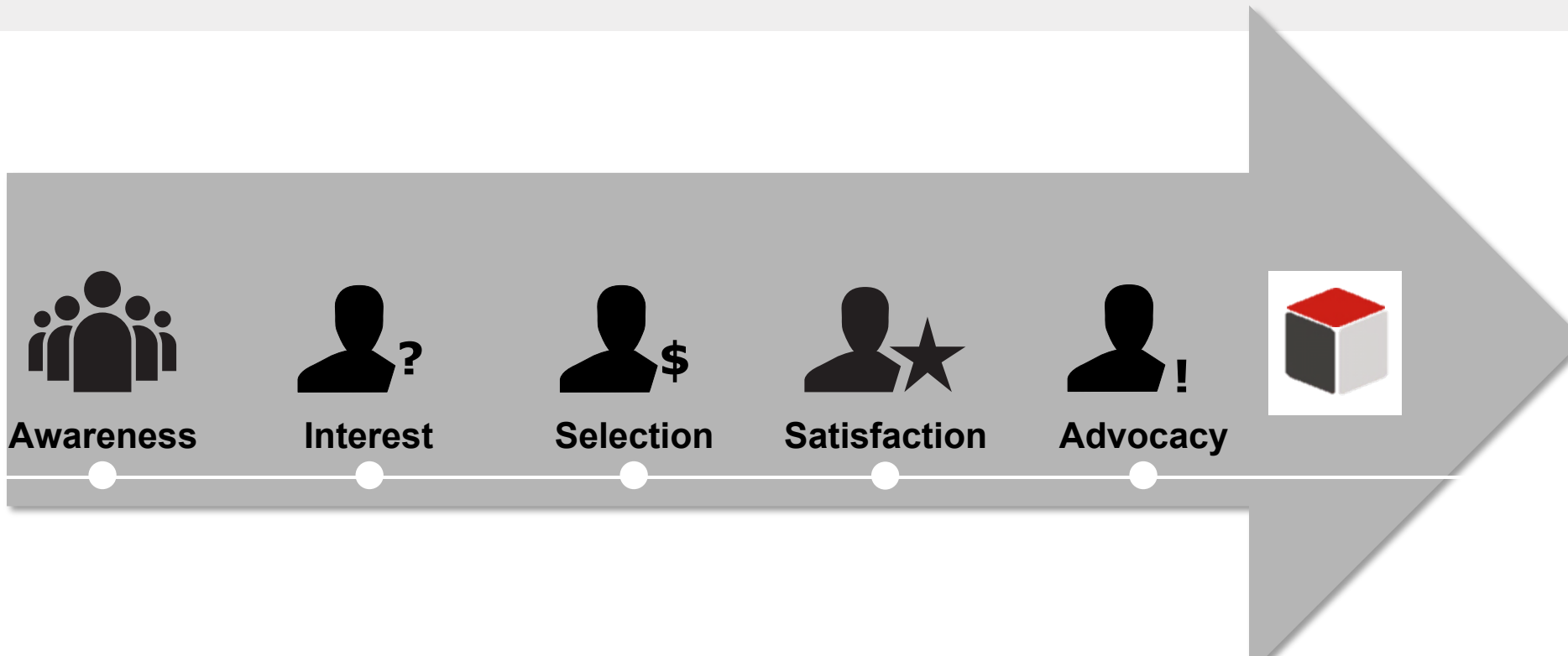**No. 1** **Understand objectives of the Mobile Strategy**

No.2 **Understand user´s need, and roles**

No.3 **Choose the right technology and plan your implementation**

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Mobile CRM Lifecycle

Awareness   **Interest**   **Selection**   **Satisfaction**   **Advocacy**

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

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Unified Mobile Experience

How it looks: Unified Mobile Experience
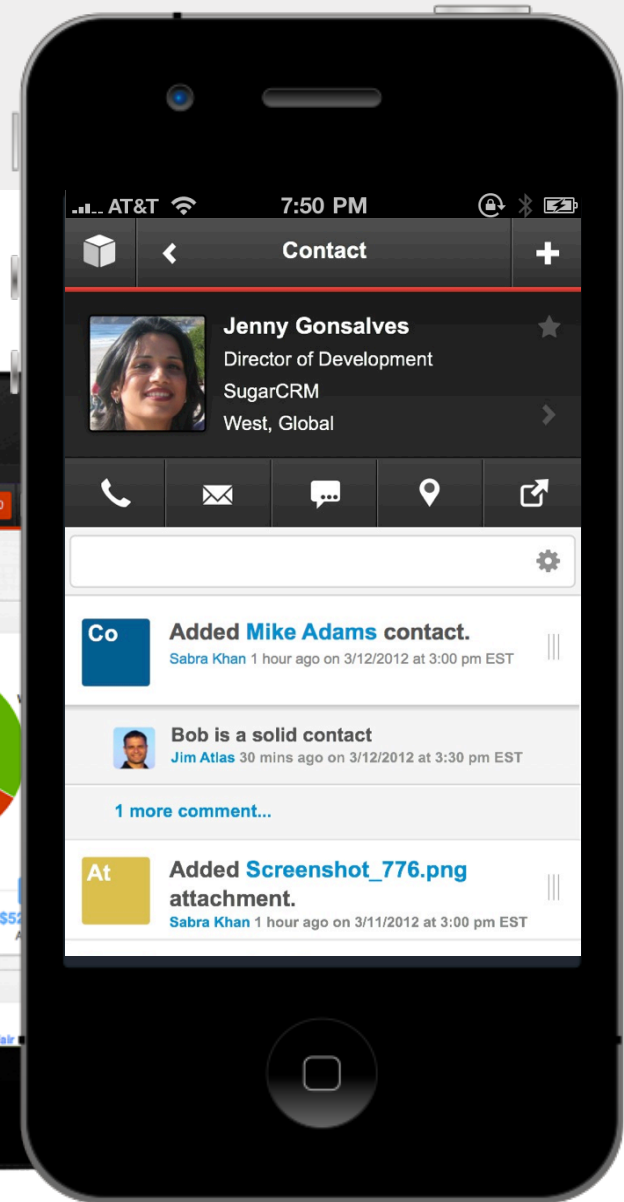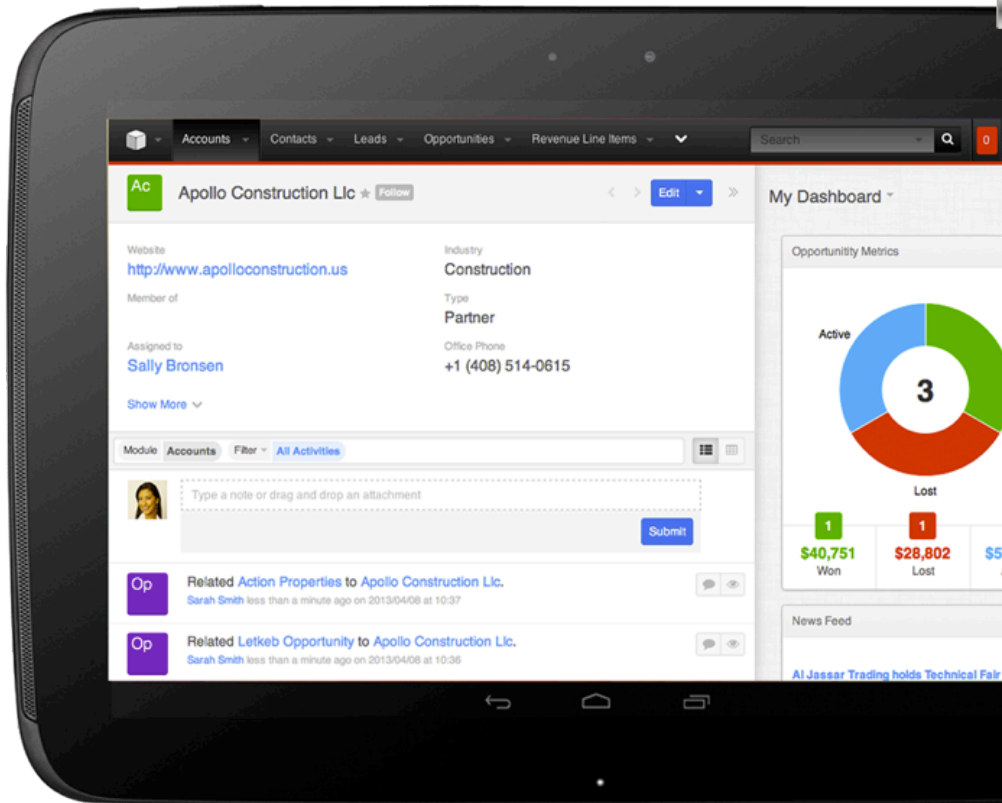
Mobile Interface
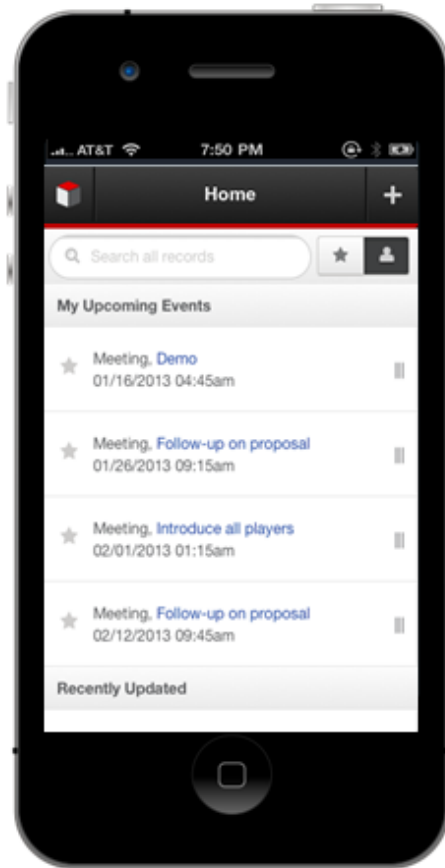
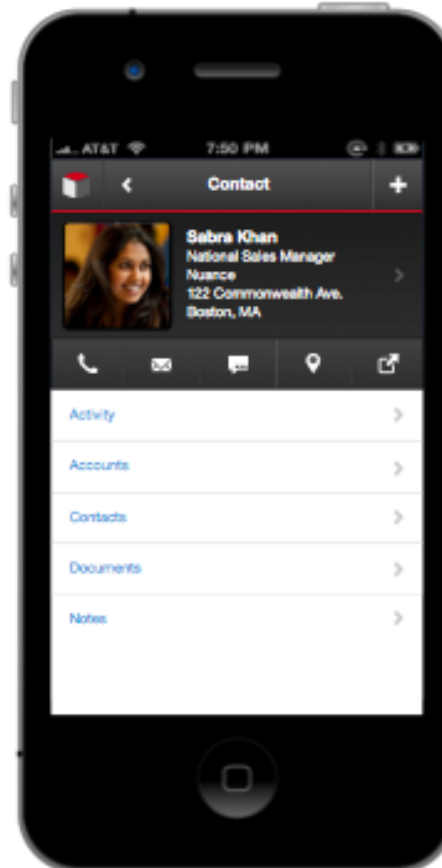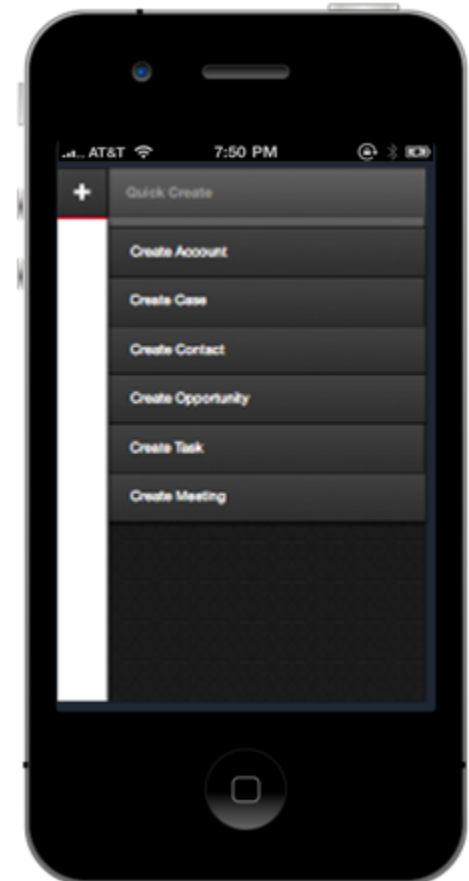**Intuitive interface including Search and Filtering**

Access to key information

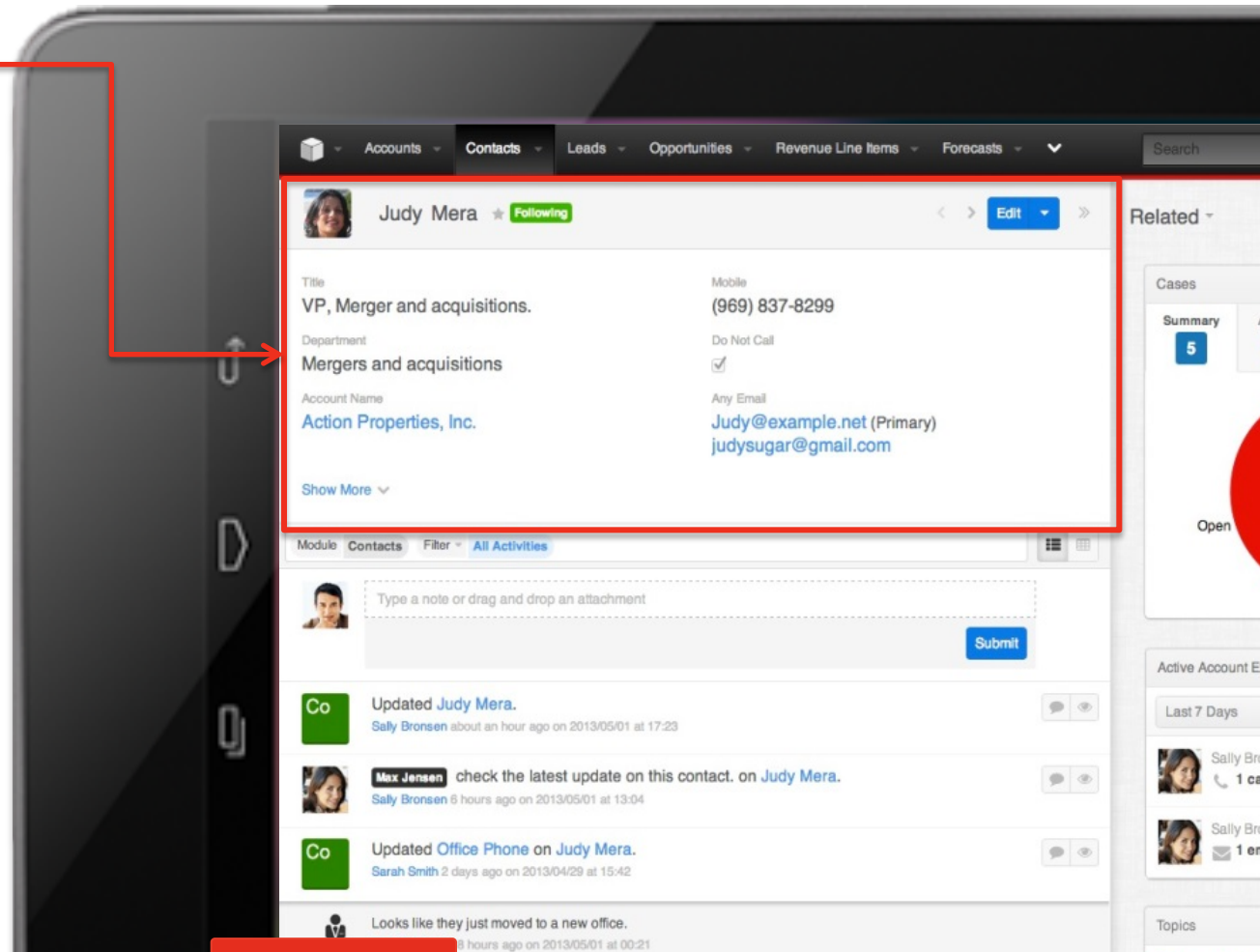**Complete record administration**

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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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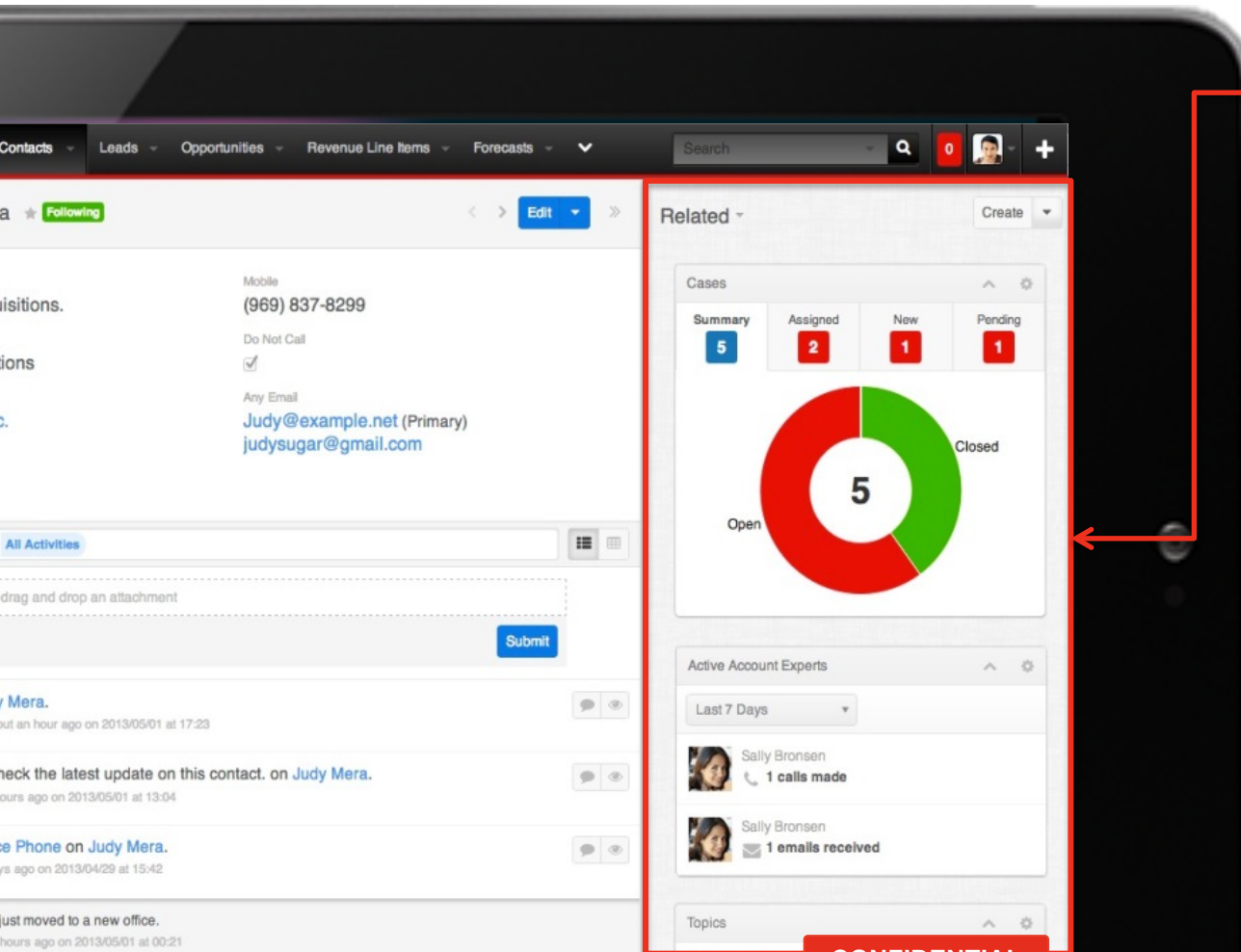
Collaboration Panel

- 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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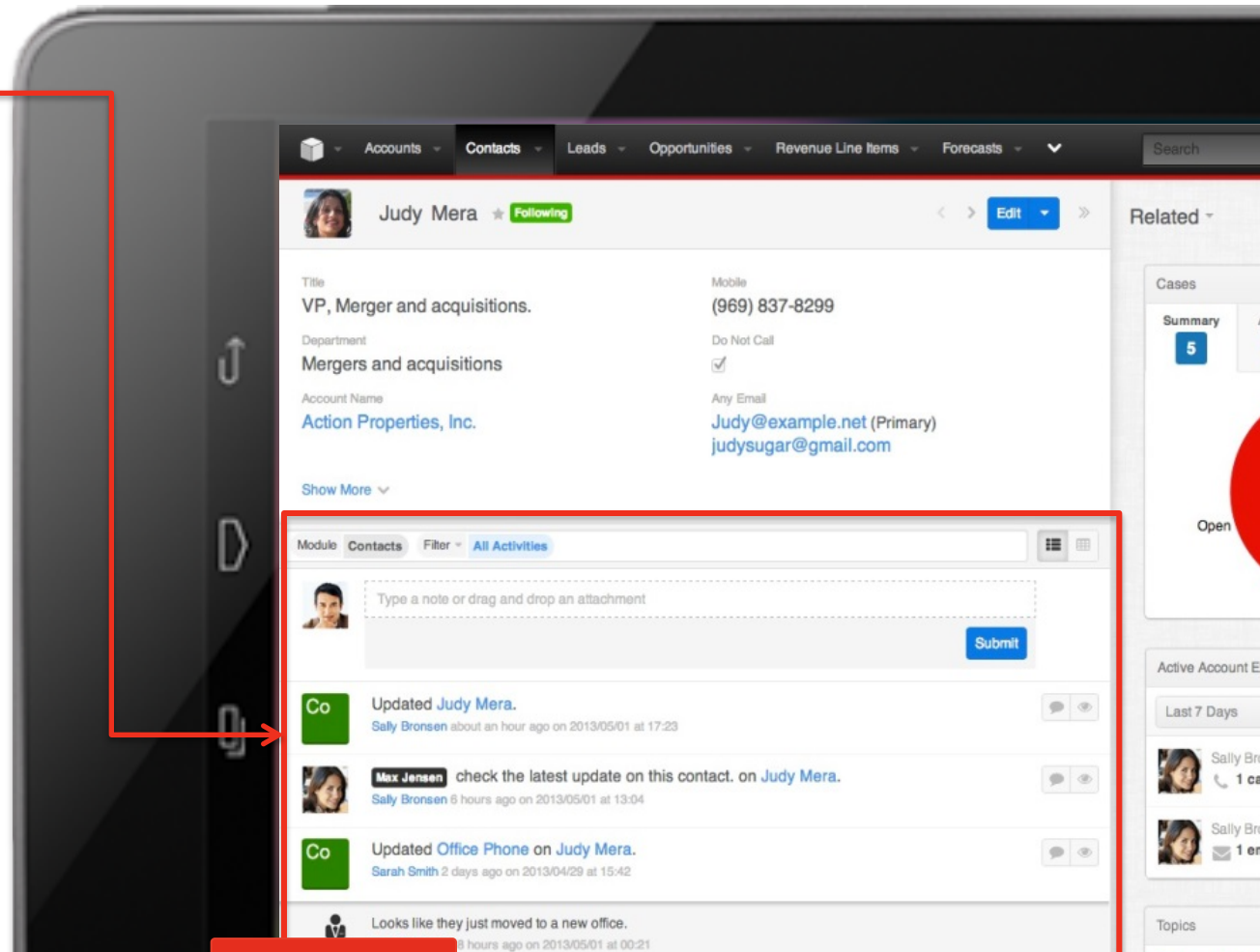
Sugar UX
Transformative, Individualized, Immersive

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

CONFIDENTIAL

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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

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Successful Customers

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