SugarCRM

Sven Heijnen – SugarCRM

Analyst Review

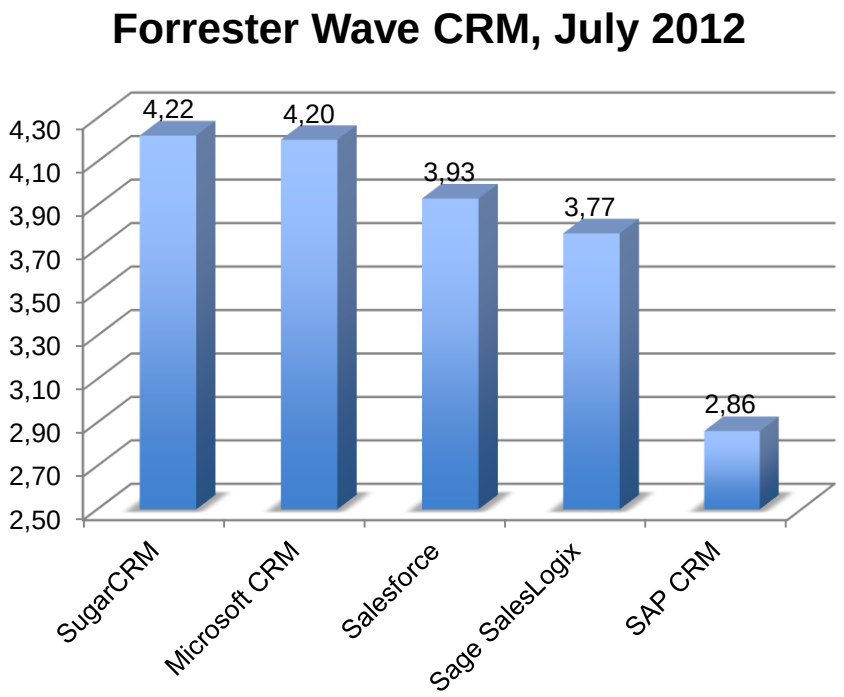
"Key strengths include low application and implementation costs and strong internationalisation support, usability, and sales functionality."

"It offers sound support for mobile CRM."

"The technical skill sets required to support the application tend to be more widely available than for other CRM solutions, thereby lowering resource support costs."

Forrester Wave CRM Mid Market report, July 2012

FORRESTER®

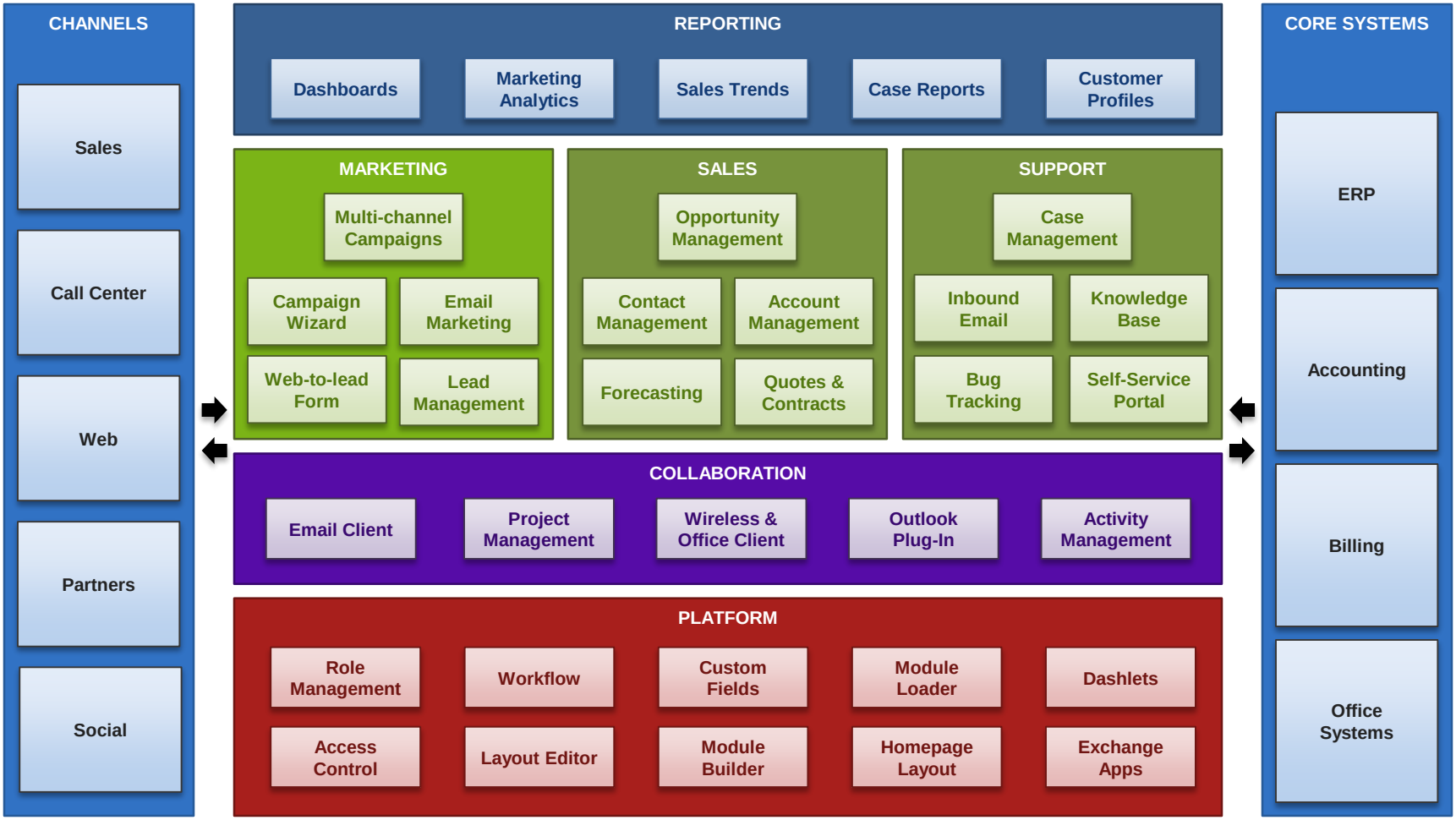


Customers in a variety of industries

Overview

Sales Automation

Complete CRM Solution



We Believe in an Open Cloud

SUGAR PRIVATE CLOUD™

SUGAR ON-DEMAND™

SUGAR on PUBLIC CLOUD

- Run Anywhere
- Run on any device
- Run at all time

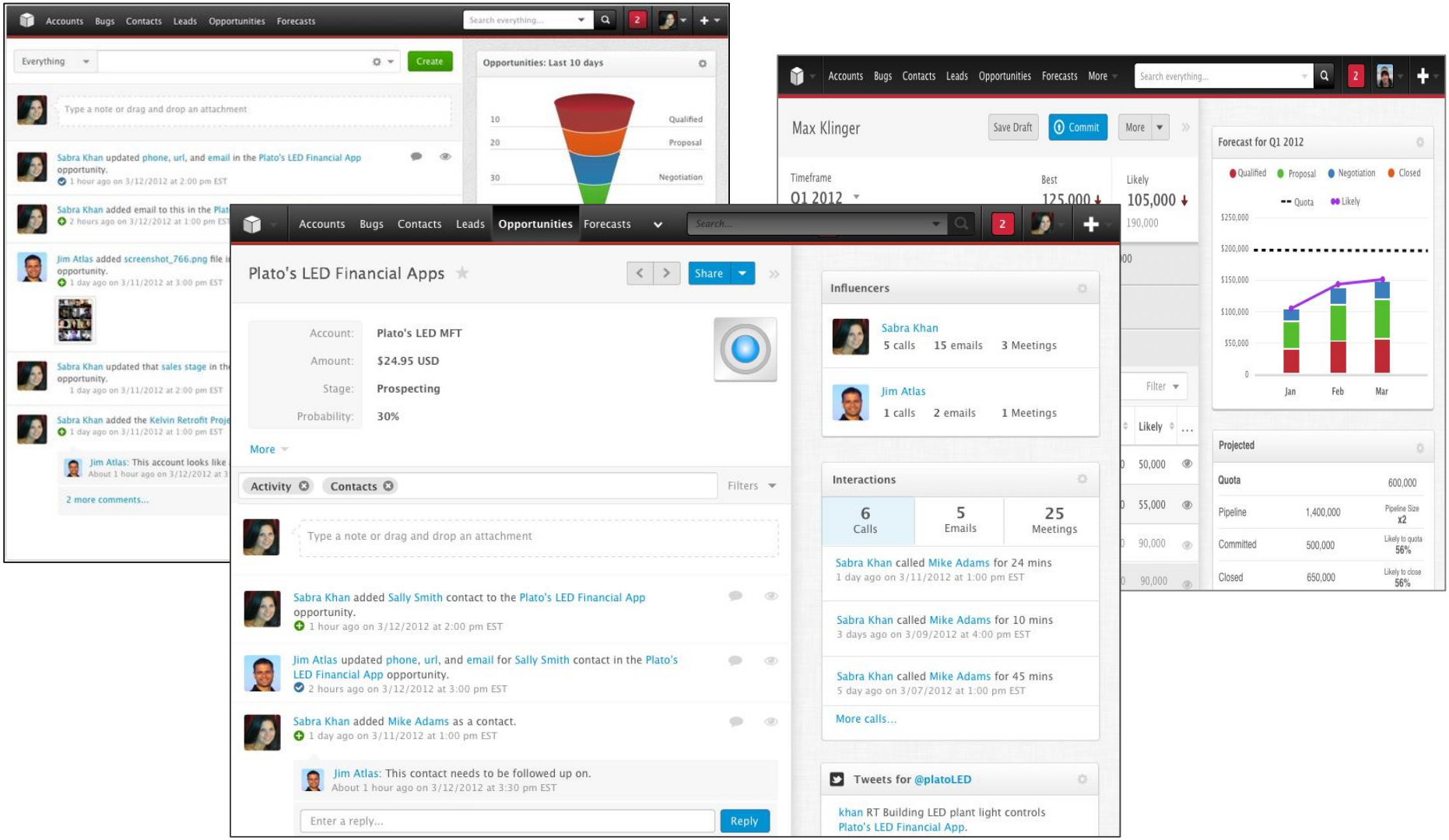
SUGAR ON-SITE™

SUGAR on PARTNER CLOUD

Sugar 7

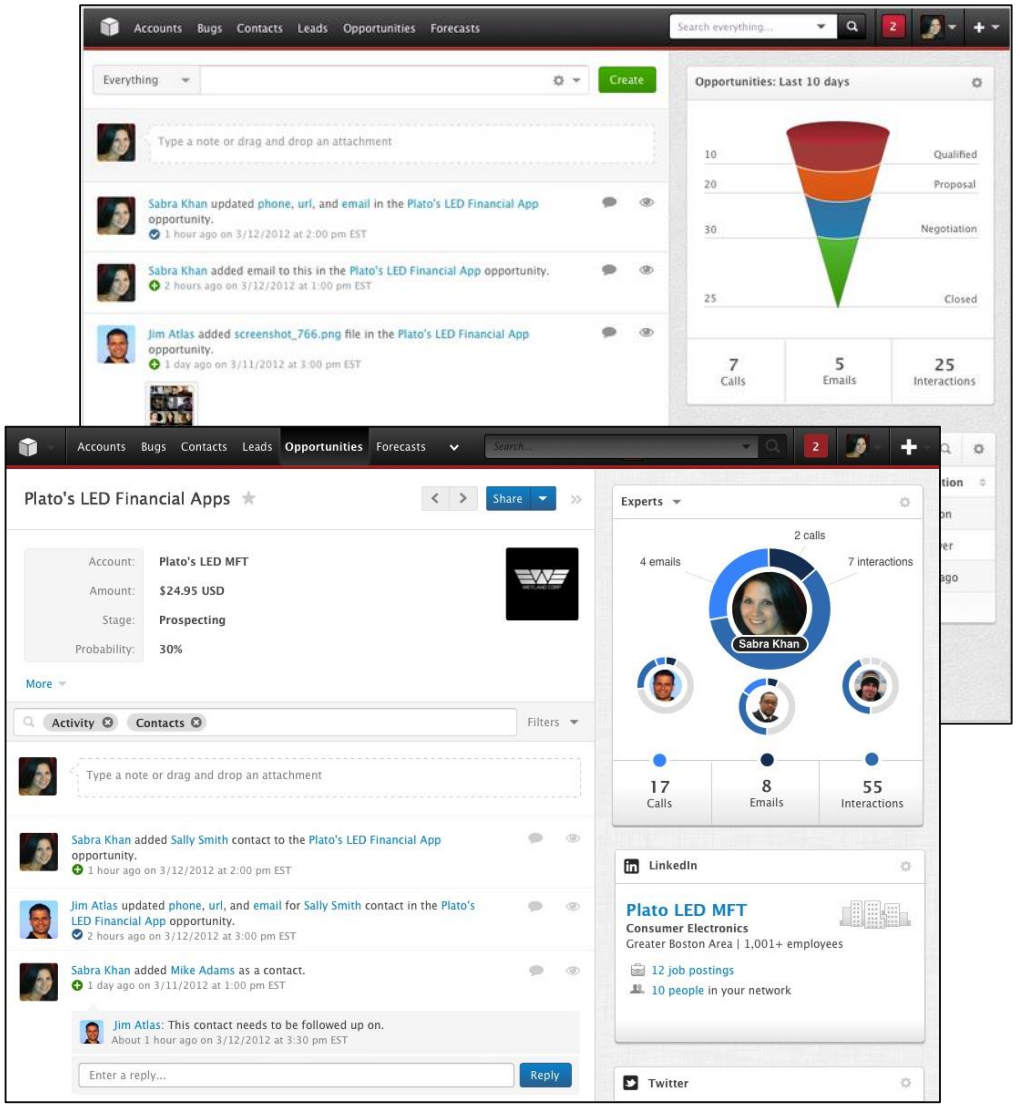
Industry Leading
New and improved

Introducing Sugar 7



Sugar 7.0

- New, intuitive user experience
- New Social collaboration platform
- Activity management and intelligence
- Improved Dashboard and Dashlets
- Enhanced lead management with attention to data quality during lead capture and conversion
- Product level sales opportunity tracking
- Enterprise forecasting with granular pipeline management



Accounts Bugs Contacts Leads **Opportunities** Forecasts Search... 2

Plato's LED Financial Apps

Share

Account:	Plato's LED MFT
Amount:	$24.95 USD
Stage:	Prospecting
Probability:	30%

More

Activity Contacts Filters

Type a note or drag and drop an attachment

Sabra Khan added Sally Smith contact to the Plato's LED Financial App opportunity.
1 hour ago on 3/12/2012 at 2:00 pm EST

Jim Atlas updated phone, url, and email for Sally Smith contact in the Plato's LED Financial App opportunity.
2 hours ago on 3/12/2012 at 3:00 pm EST

Sabra Khan added Mike Adams as a contact.
1 day ago on 3/11/2012 at 1:00 pm EST

Jim Atlas: This contact needs to be followed up on.
About 1 hour ago on 3/12/2012 at 3:30 pm EST

Enter a reply... Reply

Influencers

Sabra Khan
5 calls 15 emails 3 Meetings

Jim Atlas
1 calls 2 emails 1 Meetings

Interactions

6 Calls	5 Emails	25 Meetings

Sabra Khan called Mike Adams for 24 mins
1 day ago on 3/11/2012 at 1:00 pm EST

Sabra Khan called Mike Adams for 10 mins
3 days ago on 3/09/2012 at 4:00 pm EST

Sabra Khan called Mike Adams for 45 mins
5 day ago on 3/07/2012 at 1:00 pm EST

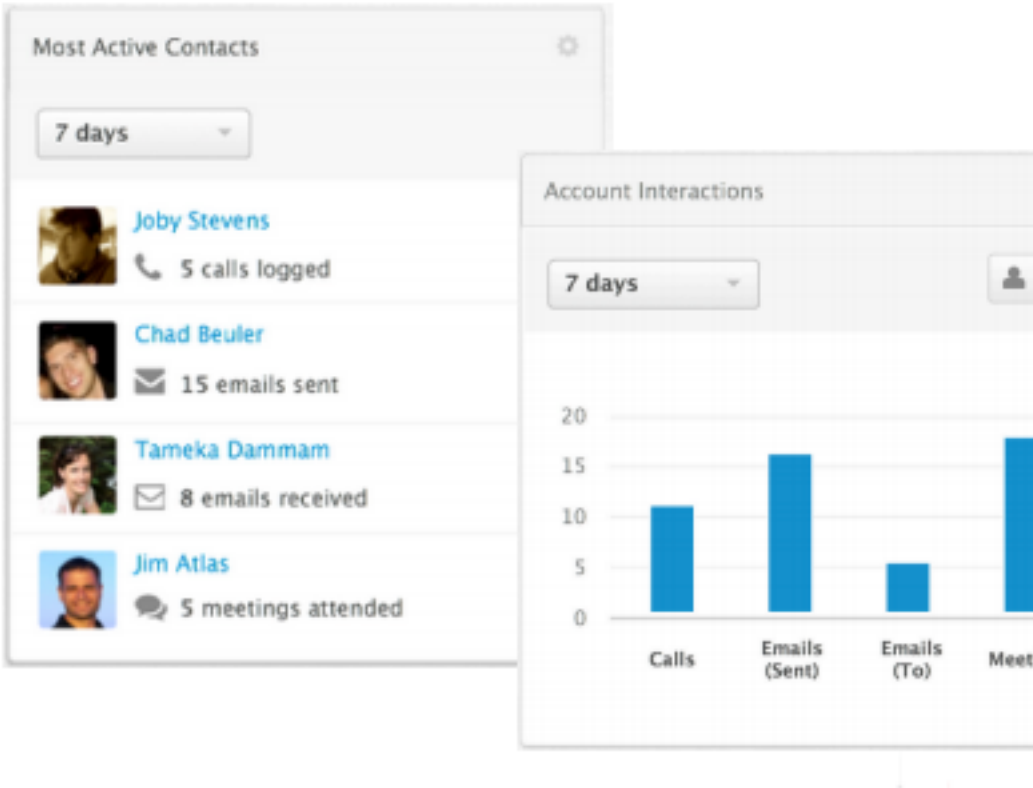
More calls...

Tweets for @platoLED

khan RT Building LED plant light controls Plato's LED Financial App.

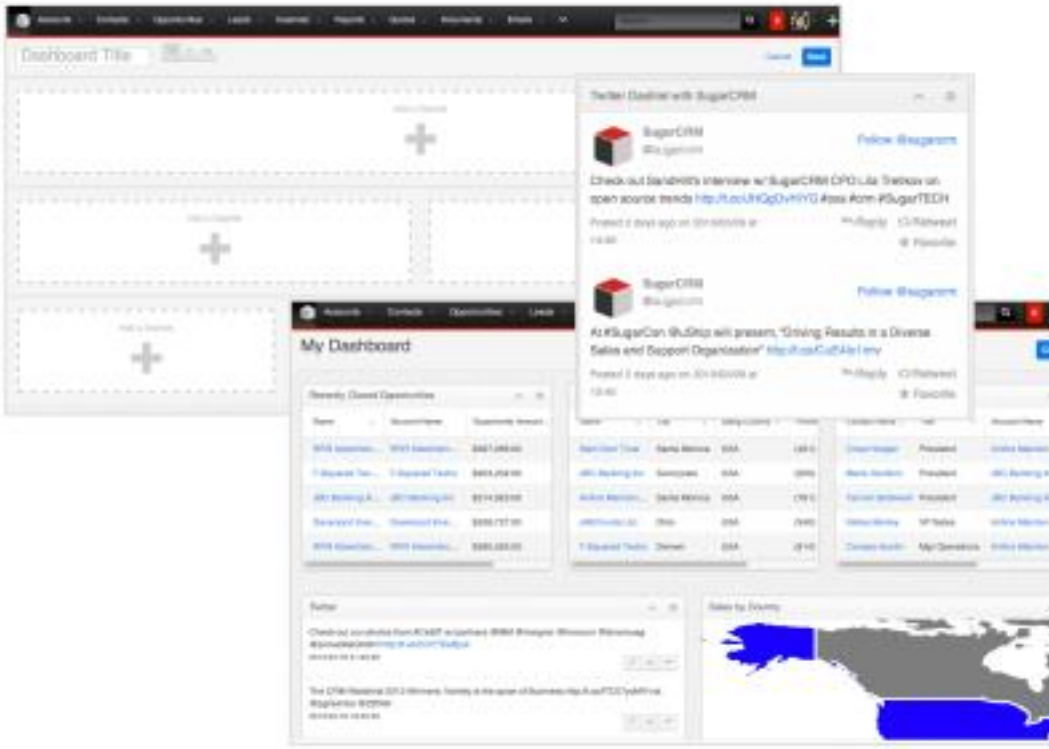
Activity Intelligence

- Central customer and contact data management
- Integration-ready, cross channel, unified interactions management
- Out-of-the-box intelligence to help identify experts across CRM functions based on their engagement level
- Configurable Dashlets to leverage federated activity data and analysis from 3rd party external data sources



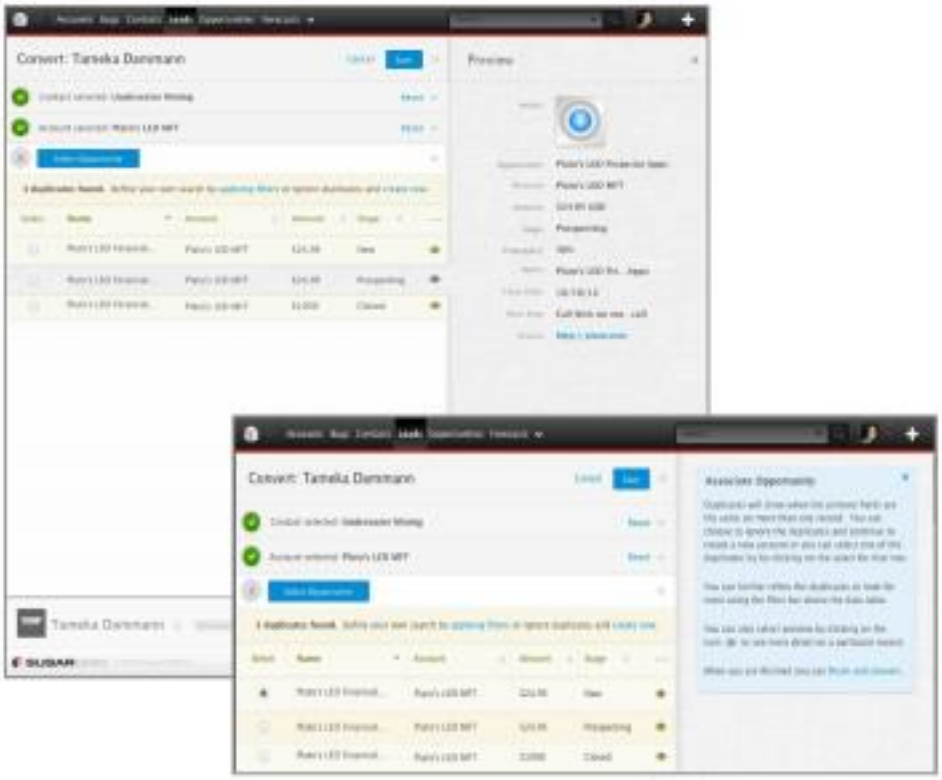
Dashboards

- Intuitive user experience to define new Dashboards and to configure new Dashlets
- Integration ready Dashlets infrastructure to support Dashboard visibility into federated intelligence from external data sources
- Out of the box Social Integration with select Vendors alongside Standard Dashlets based on List Views



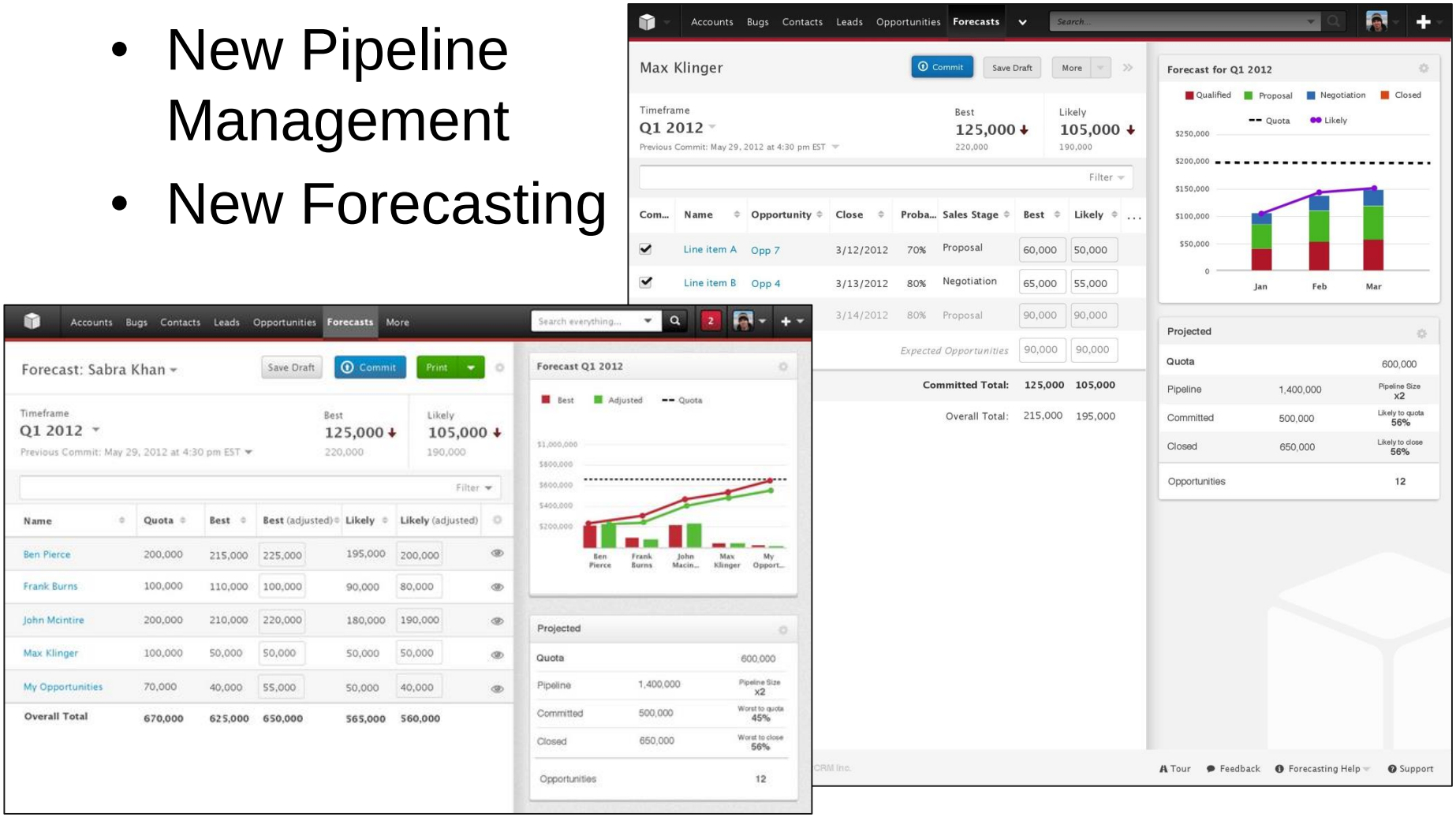
Lead Management

- Attention to data quality during lead capture and lead conversion
- Cross function management of leads in central place for sales and marketing alignment
- Central, cross function activity management to help convert more leads more often to maintain healthy pipeline



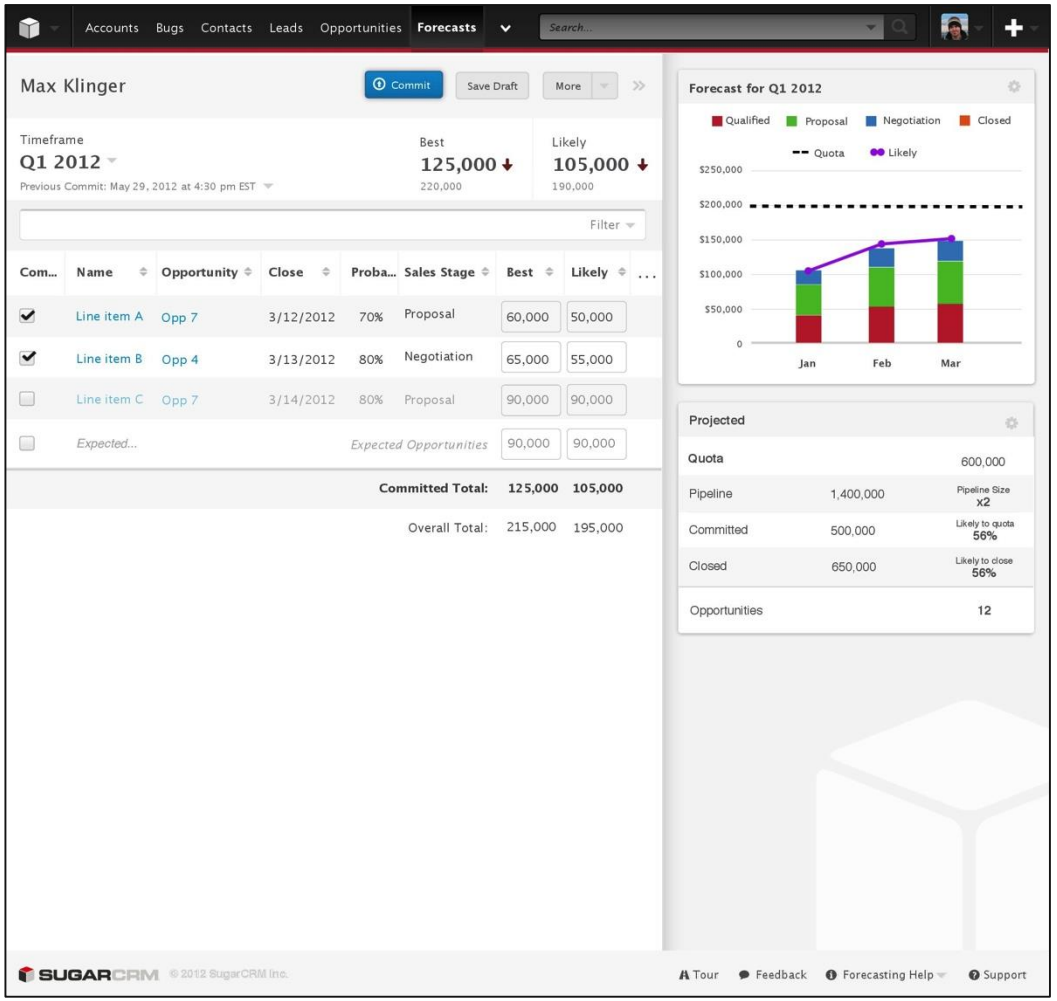
Pipeline & Forecasting

- New Pipeline Management
- New Forecasting



New Pipeline Management

- Intuitive worksheet user interface for sales reps
- Visibility into quota attainment status helps sales reps focus on the right deals to reach the quota
- Tags for Likely, Best, Worst case scenarios to deliver accurate forecast



Mobile

New and improved

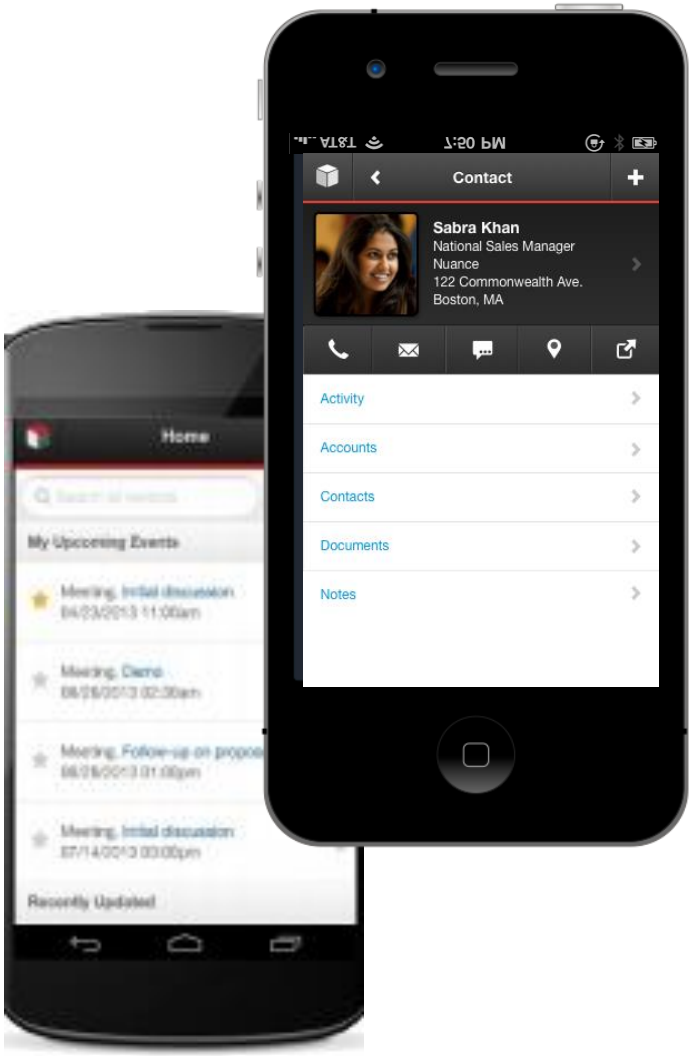
What's new?

- Coherent user experience
- New look and feel - simple & clean consistent User Experience with main application
- Fast and interactive user experience
- Support for:

  iPhone
  iPad
  Android
  Android Tablet

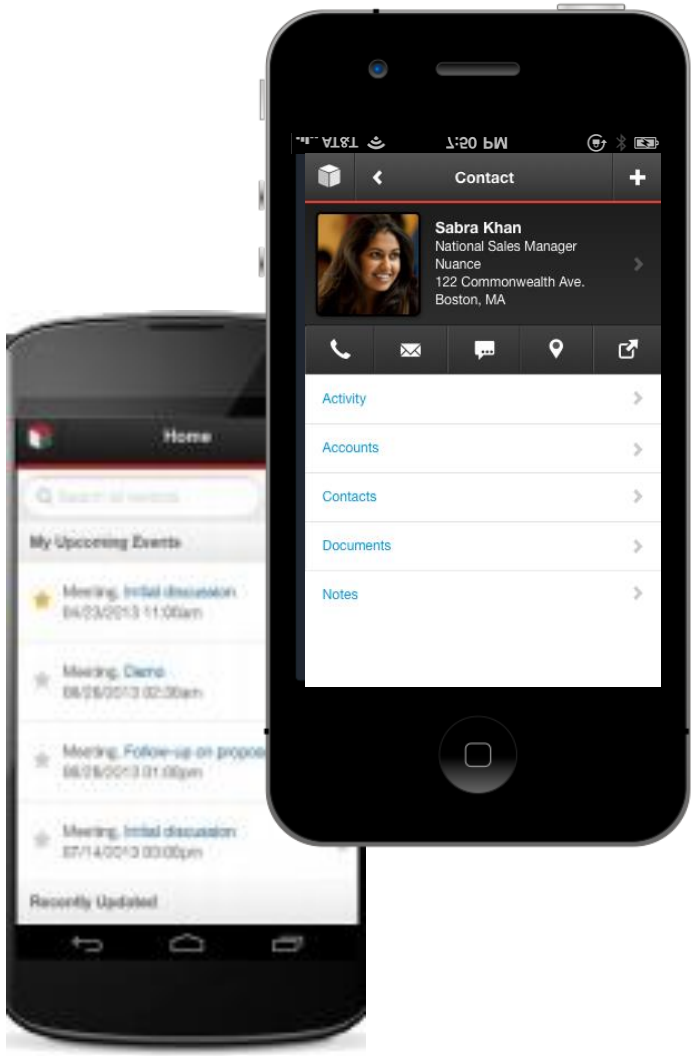
SugarCRM Mobile

- One single platform with support for multiple devices per account
- Speed and rapid access with full text search, quick create and quick summary and intuitive user interface
- Native device integration for click-to-call, click-to-text, email, map
- Automated interaction wrap up to log calls after an outbound call
- Studio configurability for displayed fields and layouts
- Support for custom modules alongside out of the box modules
- Easy access to related modules and related activities
- Chrome and Safari support for browser based user interface



SugarCRM Mobile

- Speed to match on-the-go user's expectations with Full Text Search
- Integrated, unified user experience with consistent UX patterns across desktop and mobile devices
- Standard HTML 5 based application within a native shell to leverage native iPhone capabilities
- Configurability right from within Sugar Studio
- IBM App Store Deployment (i.e. Whirlwind, etc) (dependency: IBM support)



The evolution of SocialCRM

...and where we are now...

The Evolution of Social CRM

WHAT IS SOCIAL CRM?

CRM

Short for customer relationship management, **CRM** is a company's strategy for overseeing clients and sales prospects.

S CRM

Social CRM is a philosophy and business strategy designed to engage the customer in a mutually beneficial relationship. It's supported by social technology, business rules, workflow and processes.

WHO IS THE SOCIAL CONSUMER?

- Consumes information and learns about breaking news through sites like Twitter and Facebook.
- Learns about new products through social channels and networks.
- Is wise to unsolicited promotions and trusts only relevant information.
- Desires a conversation with the brand rather than one-way ad messages.
- Expects brands to be active in the same social media sites he/she hangs out in.
- Wants brands to listen, engage and respond quickly.

User reviews?

Does anyone listen to what they have to say?

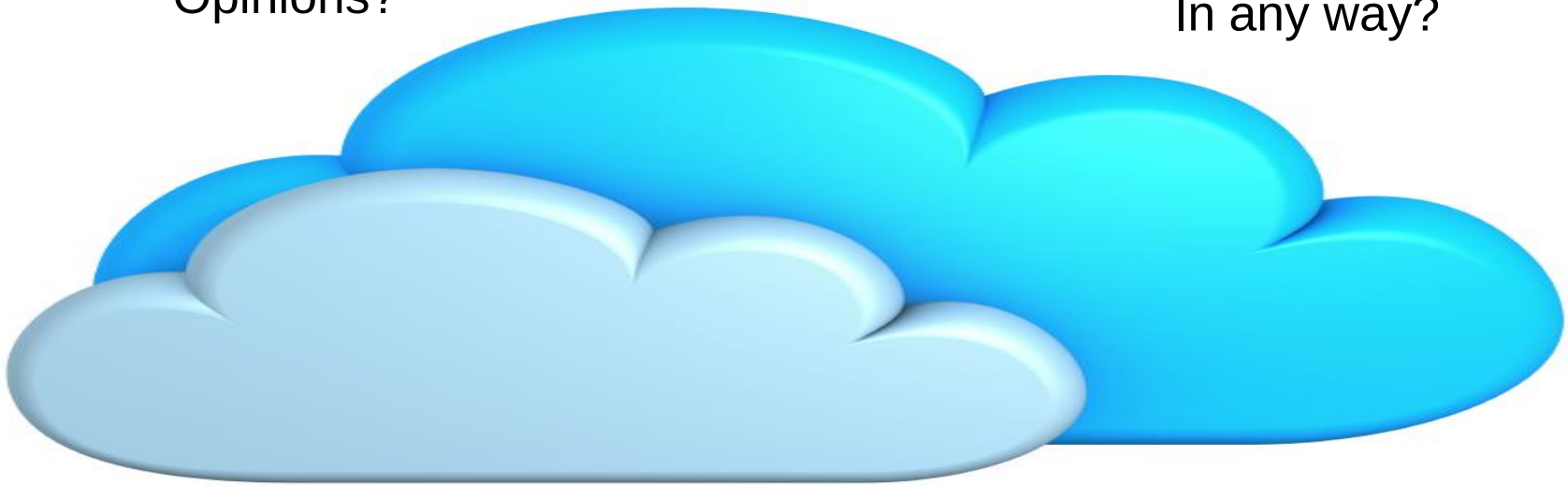
Oh, over 1000 comments on the product demo….

Do I know these guys?

Fans? Opinions?

User groups? Reviews?

Does their blog enlighten me In any way?



HOW CRM EVOLVED INTO SOCIAL CRM

	CRM	SOCIAL CRM
WHO	Specific departments	Everyone
WHAT	Company-centric process	Customer-centric process
WHERE	Defined channels	Customer-driven dynamic channels
WHEN	Set business hours	Customer-set hours
WHY	Transaction	Interaction
HOW	Messages flow outside	Messages come inside

WHY SOCIAL CRM IS MORE INFLUENTIAL

Modern consumers are changing and evolving with the growth of social media.

When deciding to engage with brands via social media, users look for:

		EXAMPLE	
77%	Incentives		Coupons, free offers
46%	Effective problem solving		Customer service reps
39%	Feedback solicitation		Polls
28%	Entertainment		Access to good, premium content
26%	New ways to interact		Widgets, online games, mobile apps
21%	Specialized marketing		Targeted banner ads

WHY SOCIAL CRM IS MORE INFLUENTIAL

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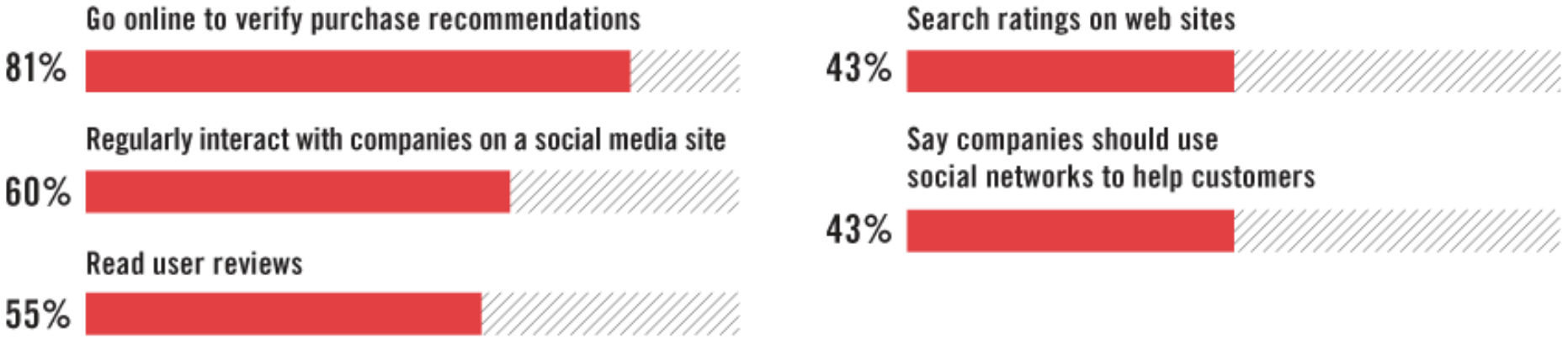
When deciding to engage with brands via social media, users look for:

American consumers who:



HOW IT'S USED CORRECTLY...

Companies are beginning to figure out that social CRM adoption must be company-wide in order for peak efficiency. Some are also finding that adding more "community managers" helps greatly.

Big names that do it right:

DELL INTUIT H&R BLOCK Comcast

Innovation is matching adoption and it's going to happen very rapidly in the next few years. —JEREMIAH OWYANG, FORRESTER RESEARCH, INC.

HOW IT'S USED INCORRECTLY...

According to Gartner.com, by 2010, more than 50% if companies will have created an online community but will fail to manage it effectively, instead driving customers away.

Rushing into social computing initiatives without clearly defined benefits for both the company and the customer will be the biggest cause of failure. —GARTNER.COM

So what can Sugar give you?

...let‘s add some Sugar.

Our Social Cloud….what are we saying…?

B2C
B2B

SocialCRM in Sugar

- Current state of play
  - Integration with Facebook
  - Integration with LinkedIn
  - Integration with Twitter
  - Integration with InsideView
  - Integration with IBM Connections
  - Integration with Google...

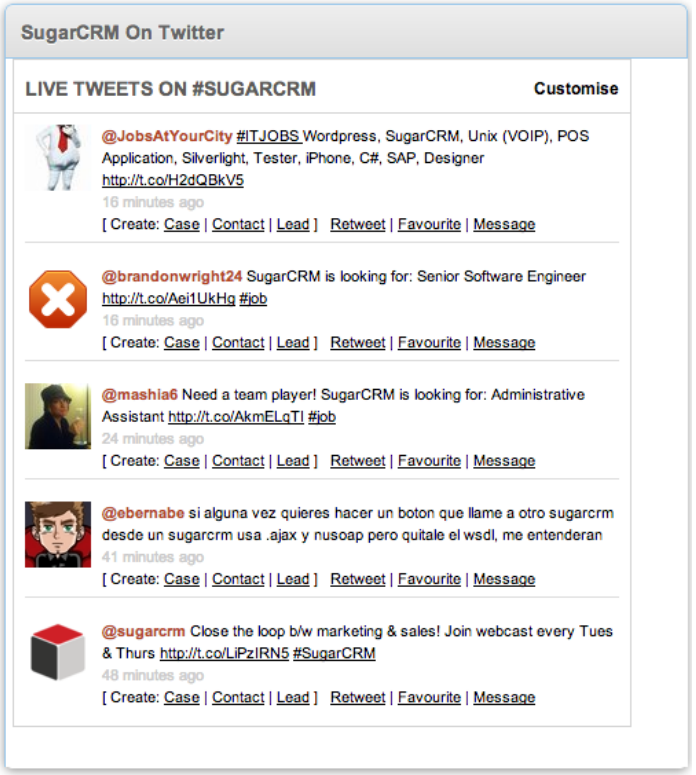
You can also use Sugar as a platform and extend the functionality much much further....

What's possible: Instant Response!

- Integrates with Sugar's API with Twitter's API
- Allows instant response to create leads, contacts and cases direct from a Sugar dashlet.
- Allows specialised Twitter seaches and you can monitor multiple accounts.

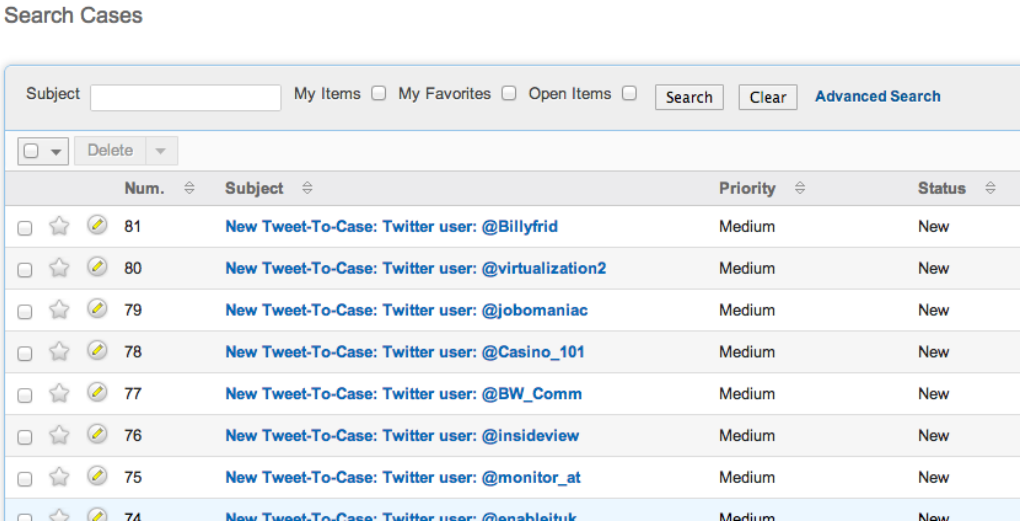
Why would we do this?

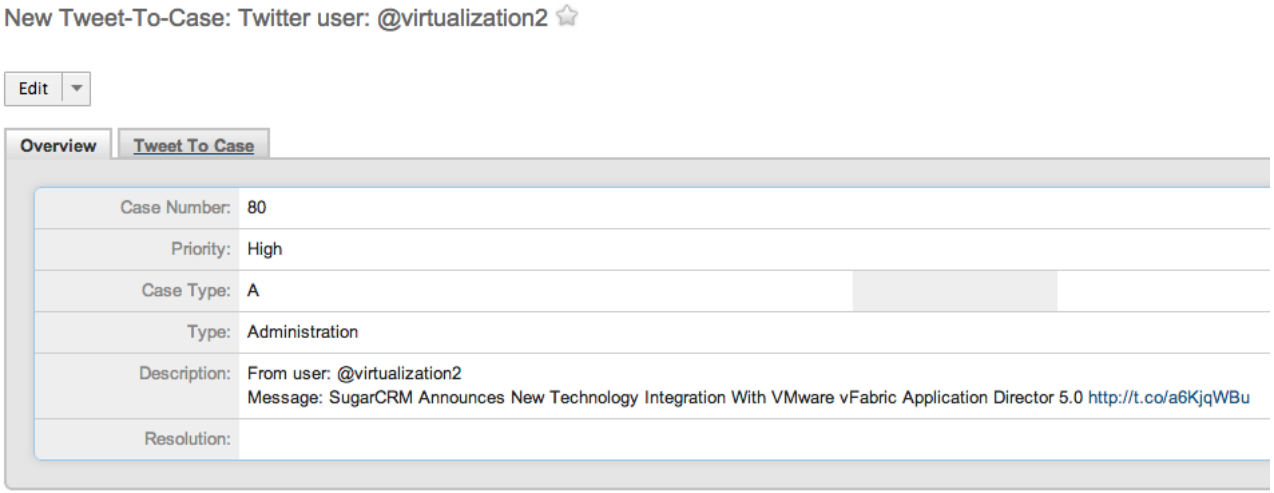
- Demographics analysis
- Customer clustering



What's possible: Instant Response!

So here we have our new tweet-to-case cases....





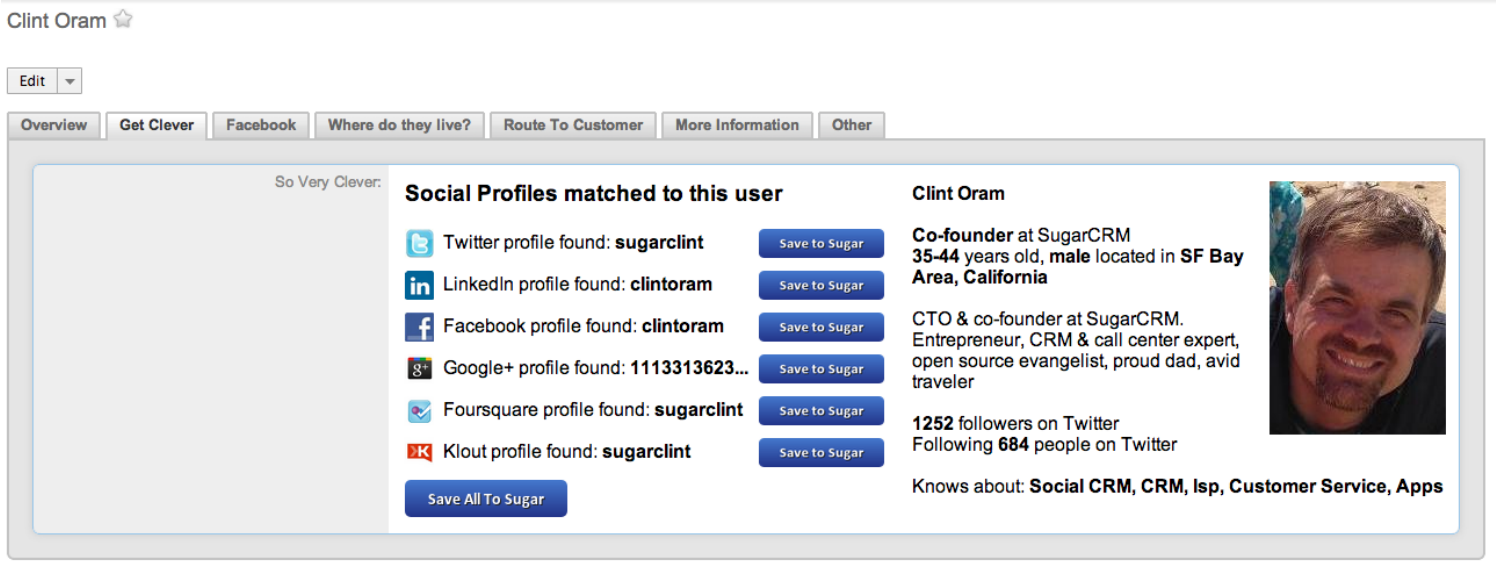
...with the ability to instantly respond to those cases from within Sugar.

What's possible: Social Automatically?

- Integrates with Clever's API
- Searches by the contact's email address
- Allows the synchronisation of social profiles into Sugar with one click.

Why would we do this?

- No need to search – get the full overview quickly, automatically.

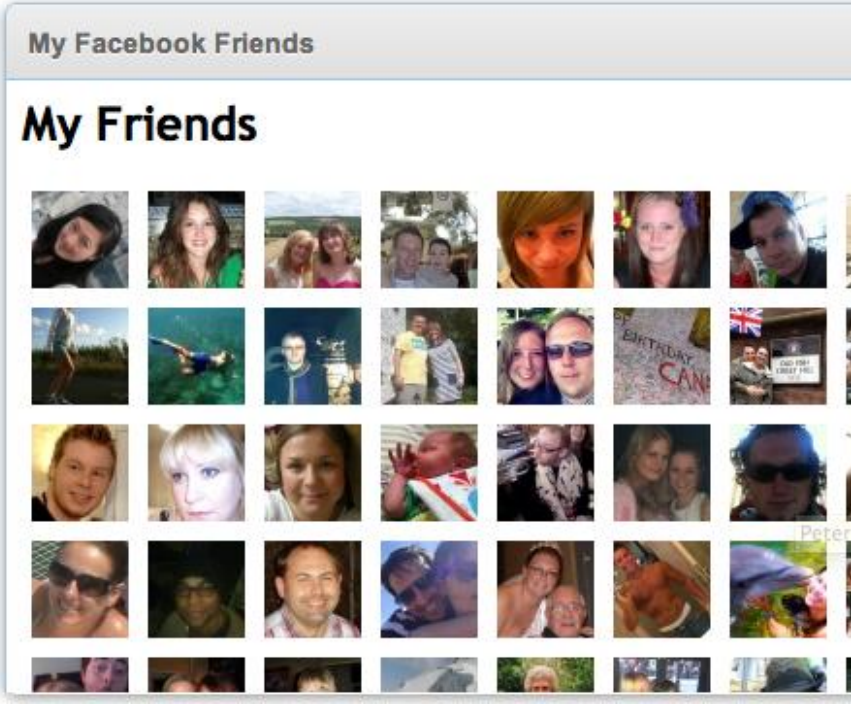


What's possible: Facebook Friends…

- Prompts user to log in to their Facebook account.
- User gives specific permissions to access profile and friends info.
- Accesses their Facebook account via FB API using FQL.
- Queries user table and pulls out info as shown.

Why would we do this?

- Access my user data to keep up to date with their FB profile.
- Get live statuses by hovering on their photos.
- Click into a profile without needing to separately log in to Facebook.

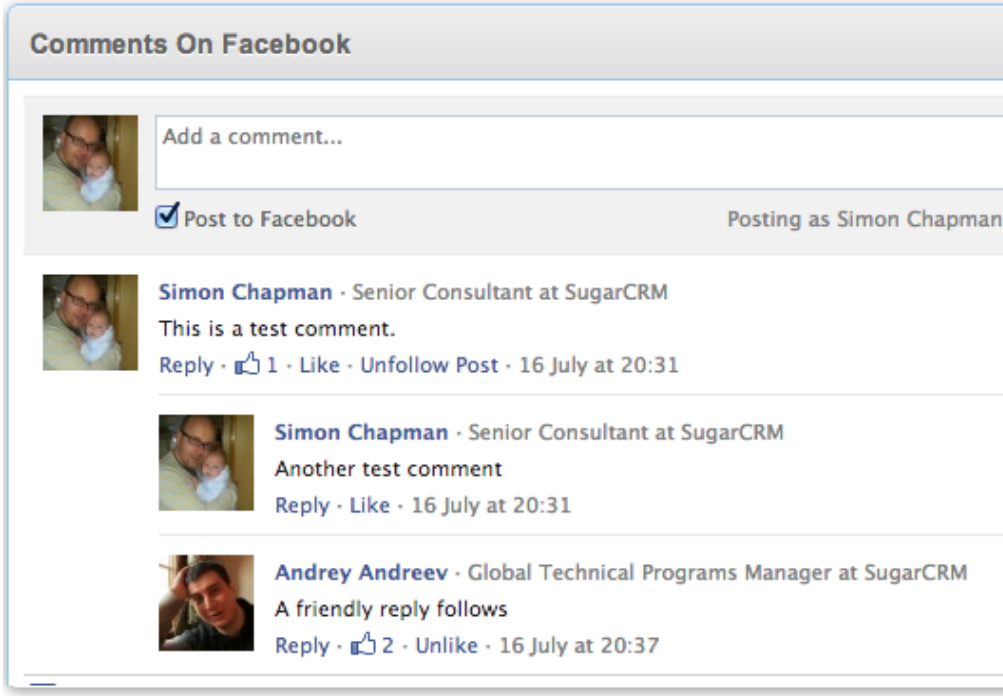


SocialCRM in Sugar: Facebook Comment and Fan Pages

- Prompts user to log in to Facebook.
- Accesses Facebook fan page based on login – if not logged in before, create new trust between Facebook account and SugarCRM.
- Uses existing Facebook Graph API and Javascript library, so results are returned in real-time.

Why would we do this?

- Allows the ability to reply to Facebook messages directly within Sugar.
- Analyse and respond to what people are saying in real time.

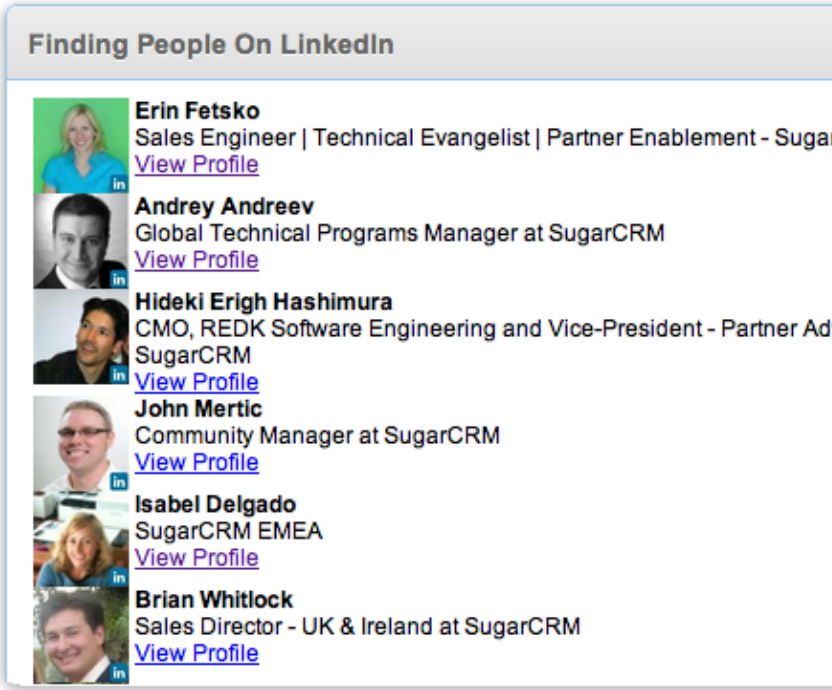


SocialCRM in Sugar: Who do I know?

- Logs into LinkedIn, based on existing user session.
- Accesses user profile based on LinkedIn API key.
- Searches for specific search term in a contact profile.
- Displays matches by name, job title/headline, location, with a link to go directly to their profile on LinkedIn.

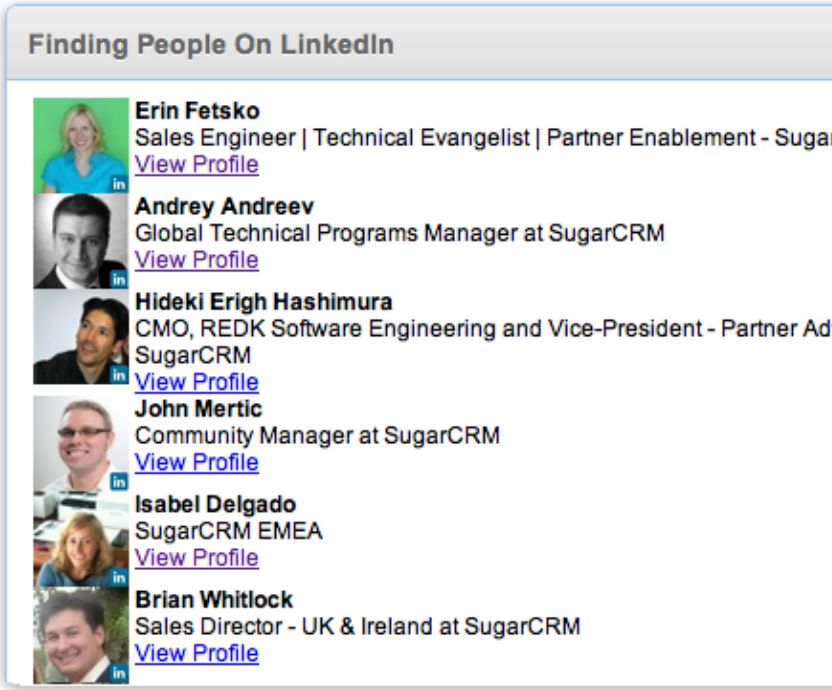
Why would we do this?

- Analyse who we know and what they know
- Mine our contacts better



SocialCRM in Sugar: But who do they know?

- Logs into LinkedIn, based on existing user session.
- Accesses user profile based on LinkedIn API key.
- Searches for specific search term in a contact profile.
- Displays matches by name, job title/headline, location, with a link to go directly to their profile on LinkedIn.
- Prepopulates search field with current record in Accounts of Contacts module.



Why would we do this?

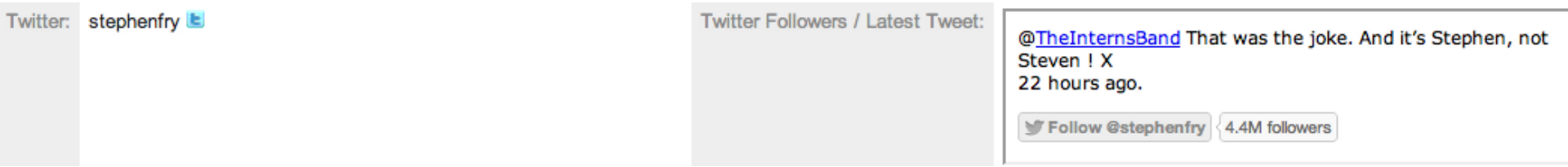
- Analyse who we know and what they know, filtering by location,
- Mine our contacts better, showing me first, second and third degree connections.

What's possible: Twitter Followers

- Automatically grabs their Twitter ID from a Sugar field
- Accesses their Twitter account via Twitter's API.
- Pulls in their total followers count into a field.
- Displays their latest tweet/status update and invites you to follow them.

Why would we do this?

- Determine how influential they are.
- Stimulate a conversation by talking about their latest Twitter update.

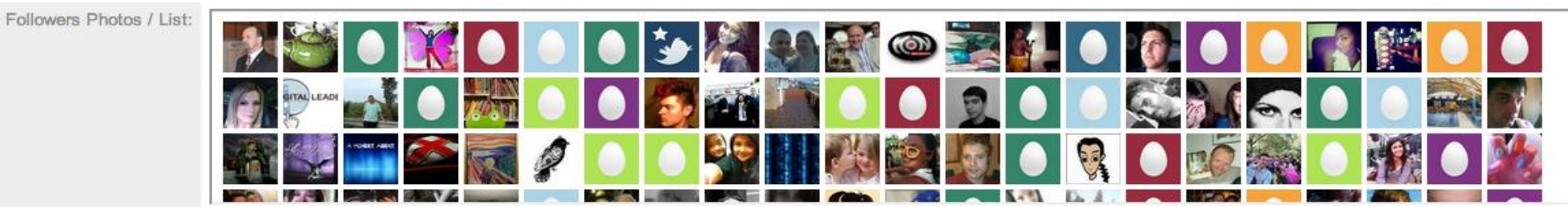


What's possible: Facepiles..

- Automatically grabs their Twitter ID
- Accesses their Twitter account via Twitter's API.
- Pulls in their followers list, ordered by most recent follower first.
- Shows their picture, which is clickable and when clicked loads that person's Twitter page.

Why would we do this?

- Show the kinds of people that are following this person.
- Determine how influential they are.

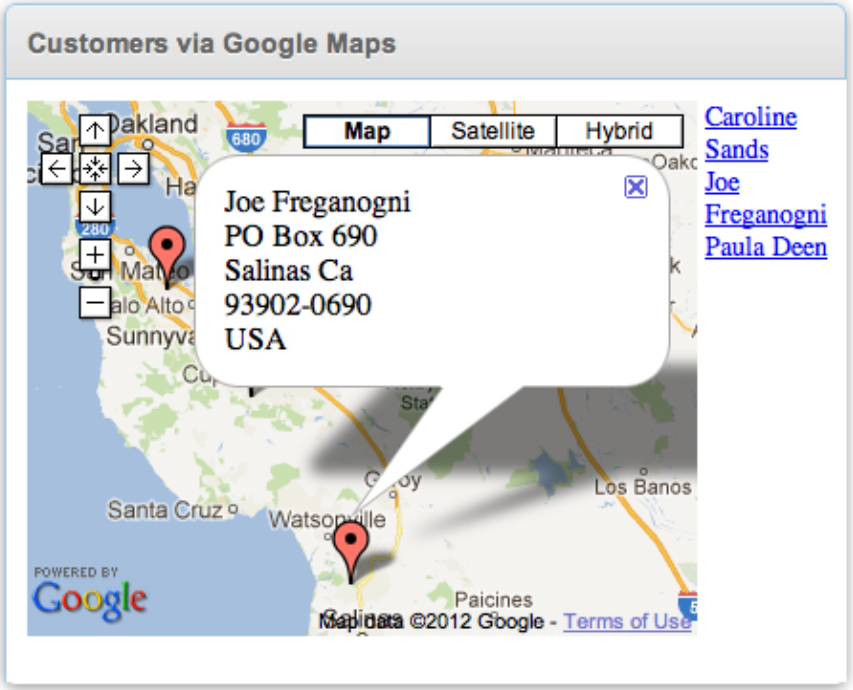


What's possible: Where do they live?

- Integrates with Sugar's API
- Loads Google Maps Javascript API
- Drops pins on each matched addressed based on street address, city, postal code and country.
- Shows three most recent customers.

Why would we do this?

- Demographics analysis
- Customer clustering

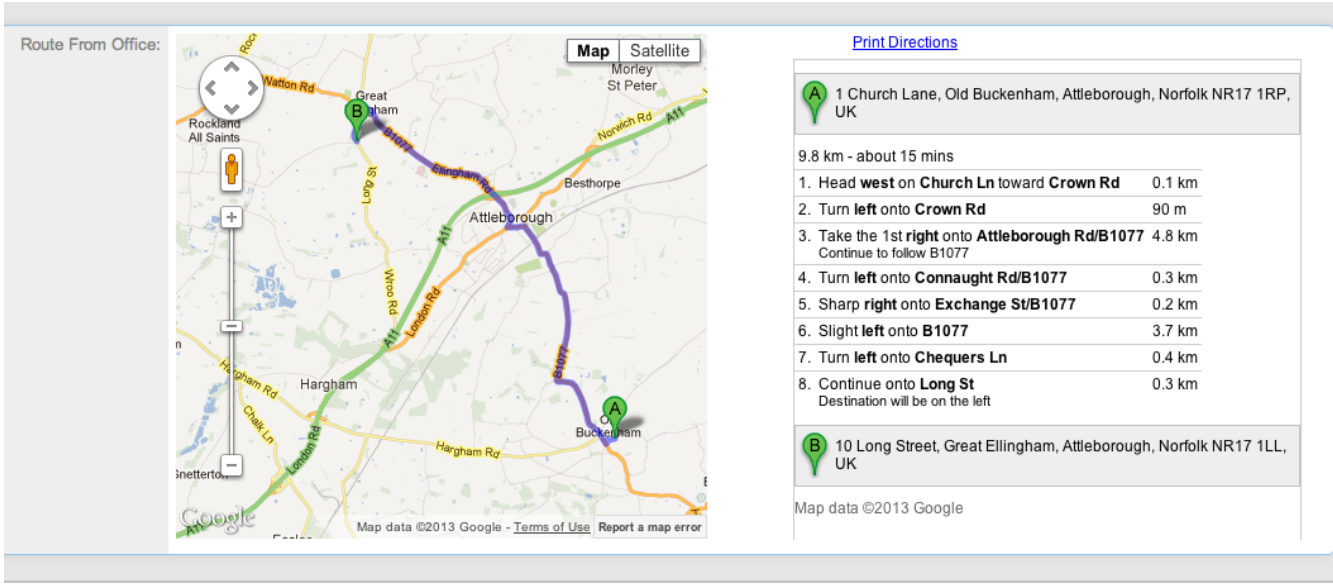


What's possible: And how do I get there?

- Integrates with Sugar's API
- Loads Google Maps Javascript API
- Builds a route from the Sugar user to the customer.

Why would we do this?

- Simple turn-by-turn maps
- Print directions
- Convenience.

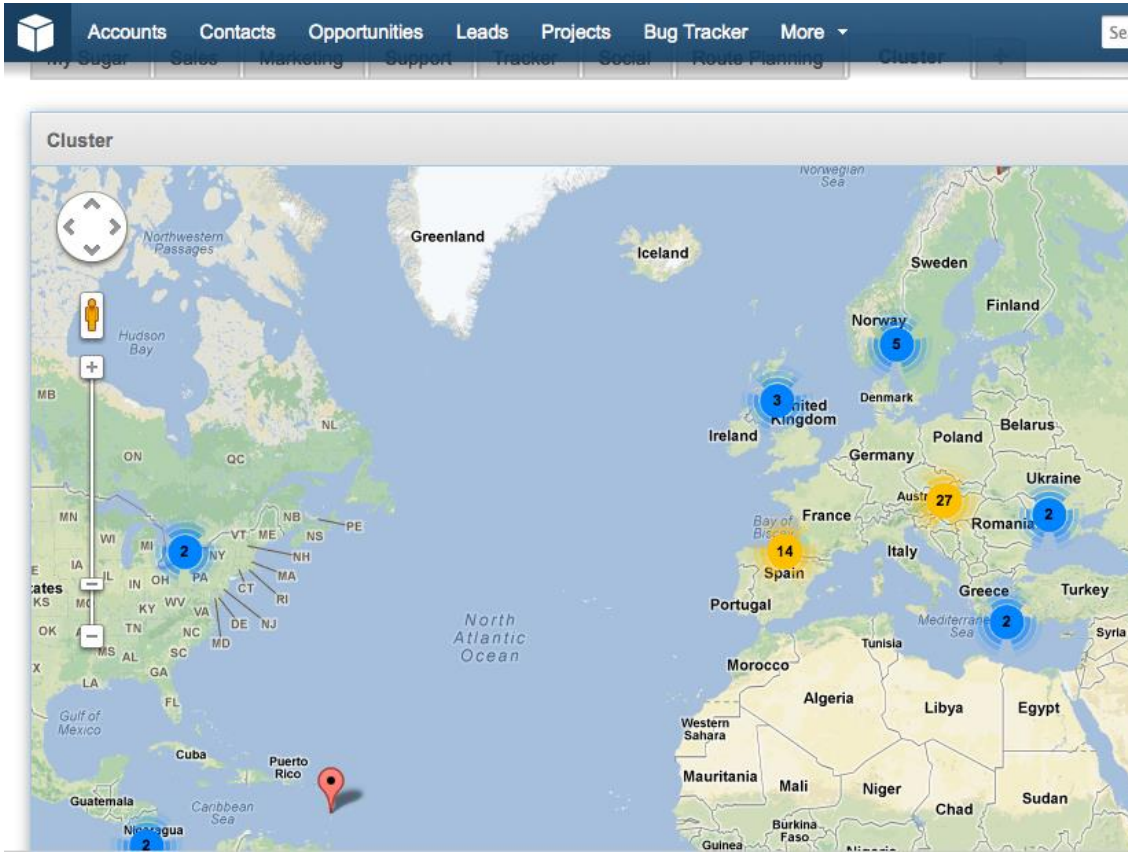


What's possible: Customer Clustering

- Integrates with Sugar's API
- Loads Google Maps Javascript API
- Builds customer clusters from the Sugar address data.

Why would we do this?

- Shows where our customers are located.
- Choose the appropriate location to visit, or allocate the appropriate time or resource to.



Thank you..

If you have any questions, please ask.