

SugarCRM

Sven Heijnen – SugarCRM

Analyst Review

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

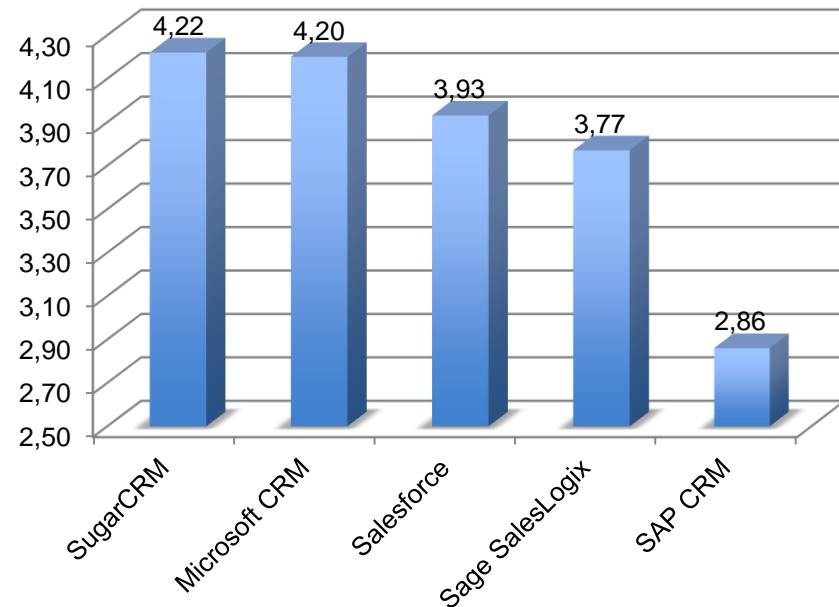
“It offers sound support for mobile CRM.”

“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 Wave CRM, July 2012



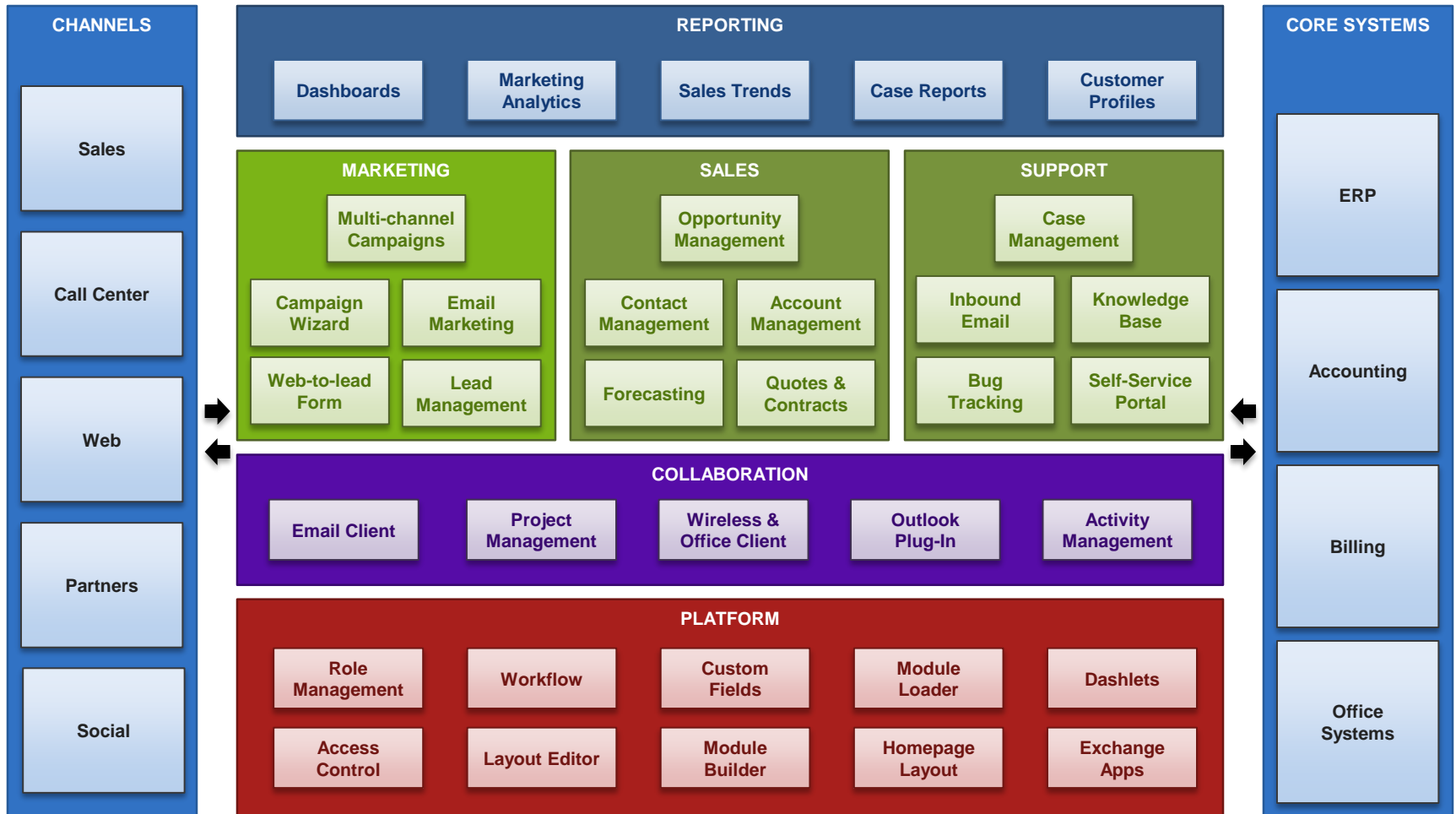
Customers in a variety of industries



Overview

Sales Automation

Complete CRM Solution



We Believe in an Open Cloud



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

Sugar 7

Industry Leading
New and improved

Introducing Sugar 7

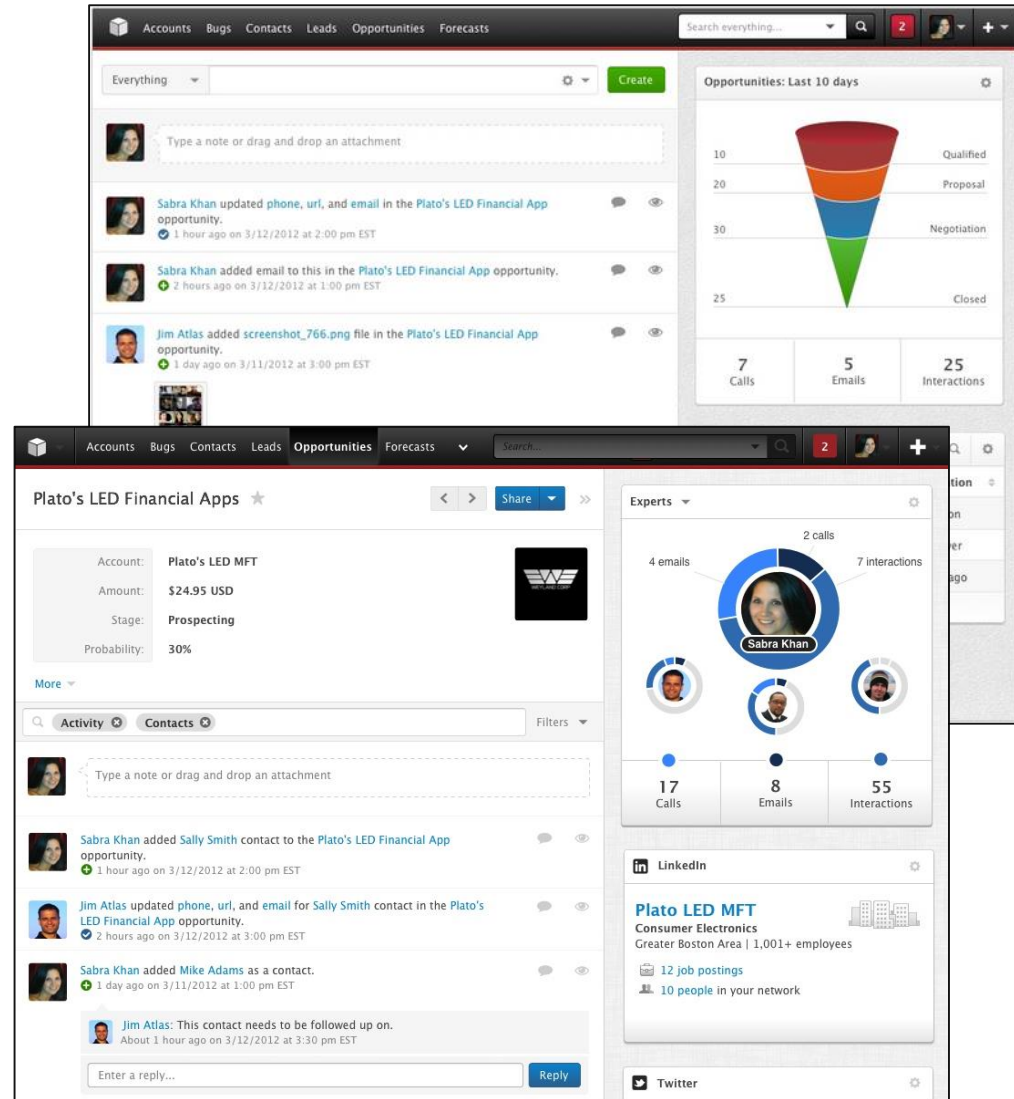
The collage displays four different views of the SugarCRM 7 interface:

- Top Left:** A view of the 'Plato's LED Financial Apps' account. It shows a list of recent activities, including updates to phone, email, and sales stage, and a sidebar with a funnel chart for 'Opportunities: Last 10 days' showing stages like Qualified, Proposal, and Negotiation.
- Top Right:** A view of the 'Max Klinger' account, showing a 'Forecast for Q1 2012' with a bar chart and a table of projected values.
- Bottom Left:** A detailed view of the 'Plato's LED Financial Apps' account, showing account details (Account: Plato's LED MFT, Amount: \$24.95 USD, Stage: Prospecting, Probability: 30%) and a list of recent activities.
- Bottom Right:** A view of the 'Influencers' section, showing a list of contacts (Sabra Khan, Jim Atlas) and their interactions (calls, emails, meetings).

The interface includes a top navigation bar with tabs for Accounts, Bugs, Contacts, Leads, Opportunities, and Forecasts. A search bar is located in the top right corner of each view.

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](#)

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

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

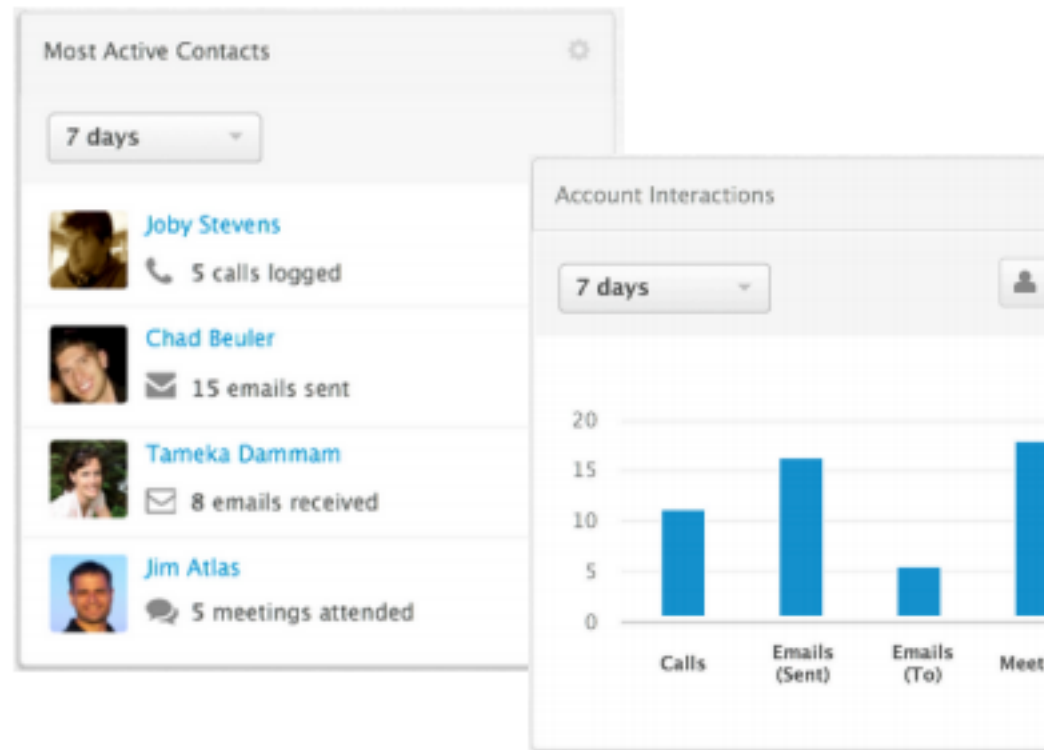
[Sabra Khan](#) called [Mike Adams](#) for 45 mins
5 day ago on 3/07/2012 at 1:00 pm EST

[More calls...](#)Tweets for [@platoLED](#)

[khan](#) RT Building LED plant light controls
[Plato's LED Financial App](#).

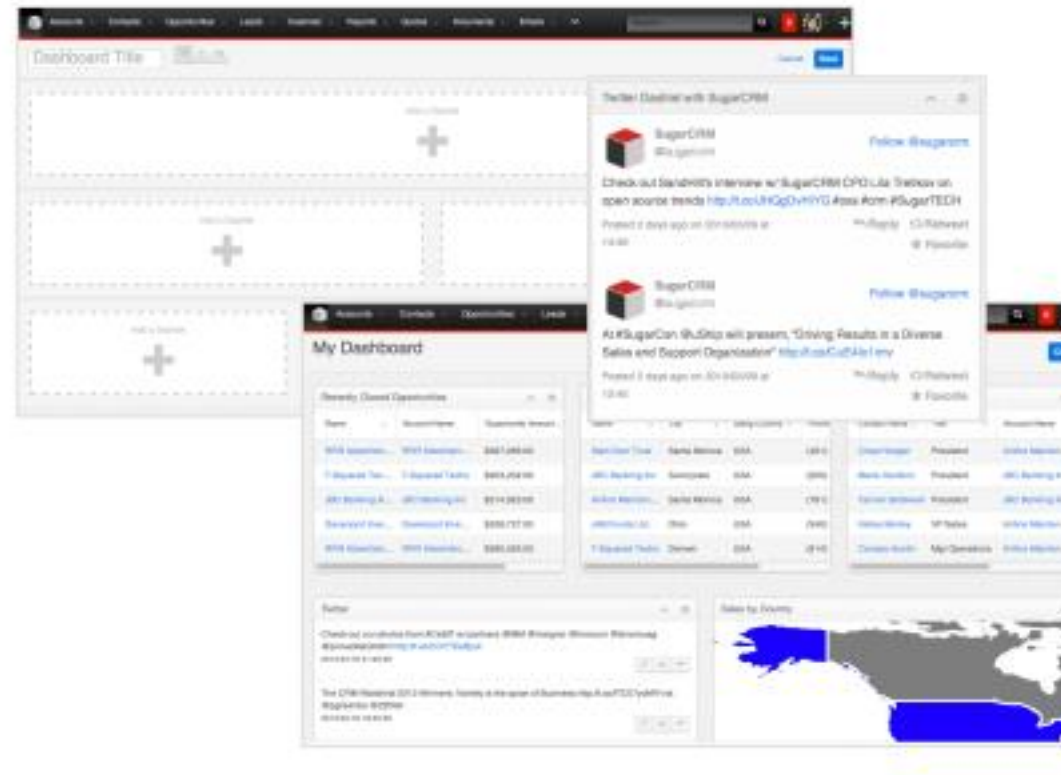
Activity Intelligence

- 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



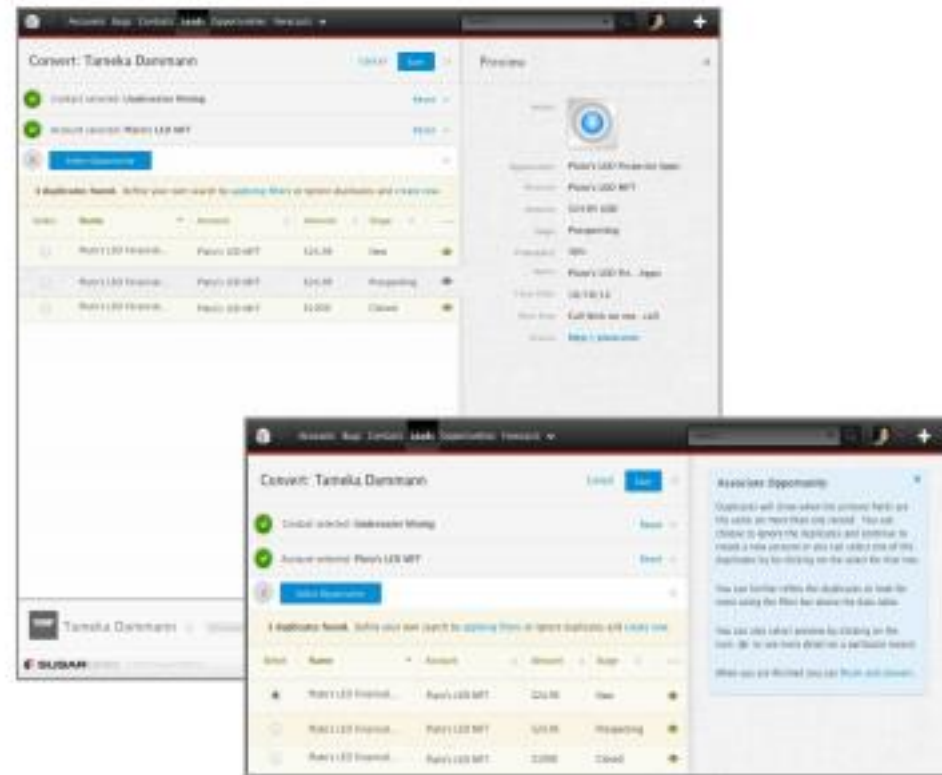
Dashboards

- 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

The screenshot displays the SugarCRM Pipeline & Forecasting interface for two users: Max Klinger and Sabra Khan.

Max Klinger's View:

- Timeframe:** Q1 2012
- Best:** 125,000 (Previous Commit: May 29, 2012 at 4:30 pm EST)
- Likely:** 105,000
- Forecast for Q1 2012:** A stacked bar chart showing sales stages: Qualified (red), Proposal (green), Negotiation (blue), and Closed (orange). A dashed line represents the Quota at 220,000. A purple line represents the Likely forecast.
- Table:**

Com...	Name	Opportunity	Close	Proba...	Sales Stage	Best	Likely
<input checked="" type="checkbox"/>	Line item A	Opp 7	3/12/2012	70%	Proposal	60,000	50,000
<input checked="" type="checkbox"/>	Line item B	Opp 4	3/13/2012	80%	Negotiation	65,000	55,000
			3/14/2012	80%	Proposal	90,000	90,000

Expected Opportunities: 90,000 (Best), 90,000 (Likely)

Committed Total: 125,000 (Best), 105,000 (Likely)

Overall Total: 215,000 (Best), 195,000 (Likely)

Projected:

Category	Value
Quota	600,000
Pipeline	1,400,000
Committed	500,000
Closed	650,000
Opportunities	12

Sabra Khan's View:

- Timeframe:** Q1 2012
- Best:** 125,000 (Previous Commit: May 29, 2012 at 4:30 pm EST)
- Likely:** 105,000
- Forecast Q1 2012:** A line chart showing sales stages: Best (red), Adjusted (green), and Quota (dashed line). The Y-axis ranges from \$200,000 to \$1,000,000.
- Table:**

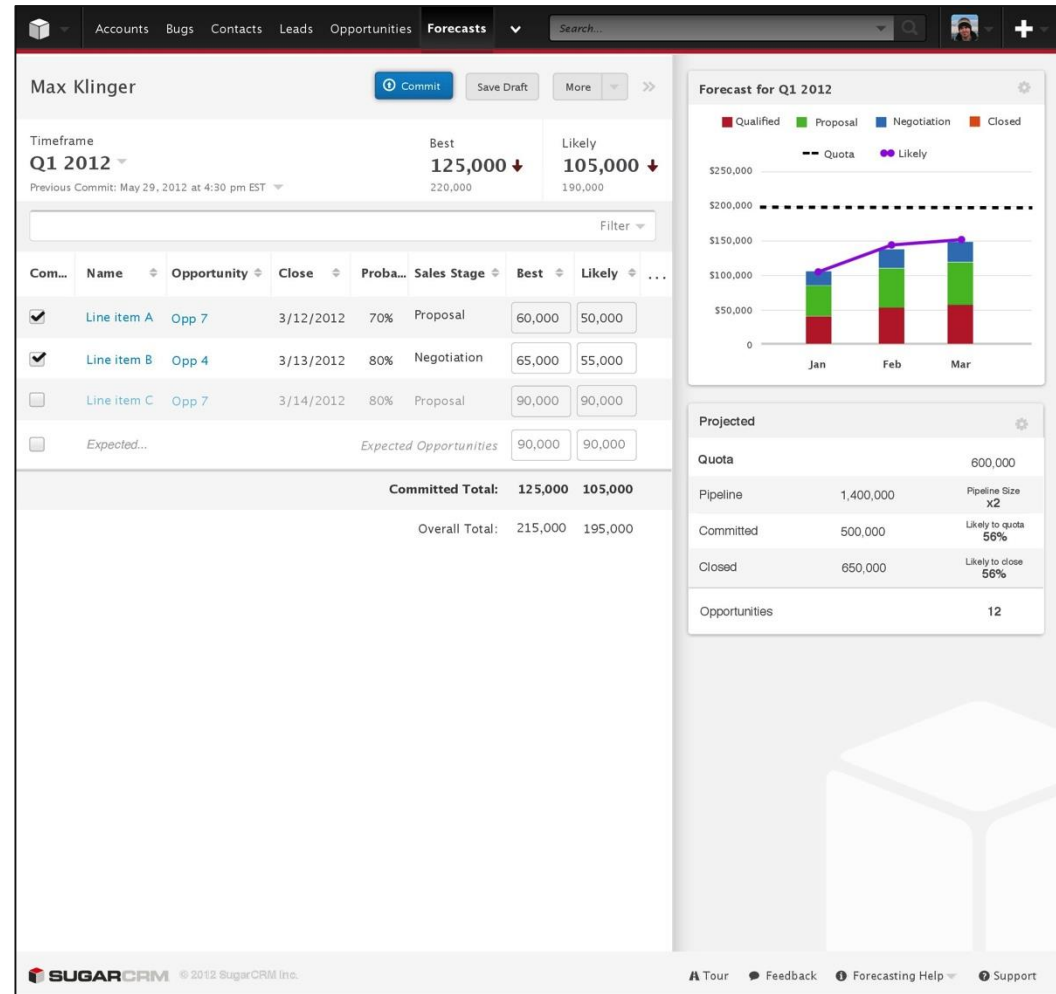
Name	Quota	Best	Best (adjusted)	Likely	Likely (adjusted)
Ben Pierce	200,000	215,000	225,000	195,000	200,000
Frank Burns	100,000	110,000	100,000	90,000	80,000
John McIntire	200,000	210,000	220,000	180,000	190,000
Max Klinger	100,000	50,000	50,000	50,000	50,000
My Opportunities	70,000	40,000	55,000	50,000	40,000
Overall Total	670,000	625,000	650,000	565,000	560,000

Projected:

Category	Value
Quota	600,000
Pipeline	1,400,000
Committed	500,000
Closed	650,000
Opportunities	12

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

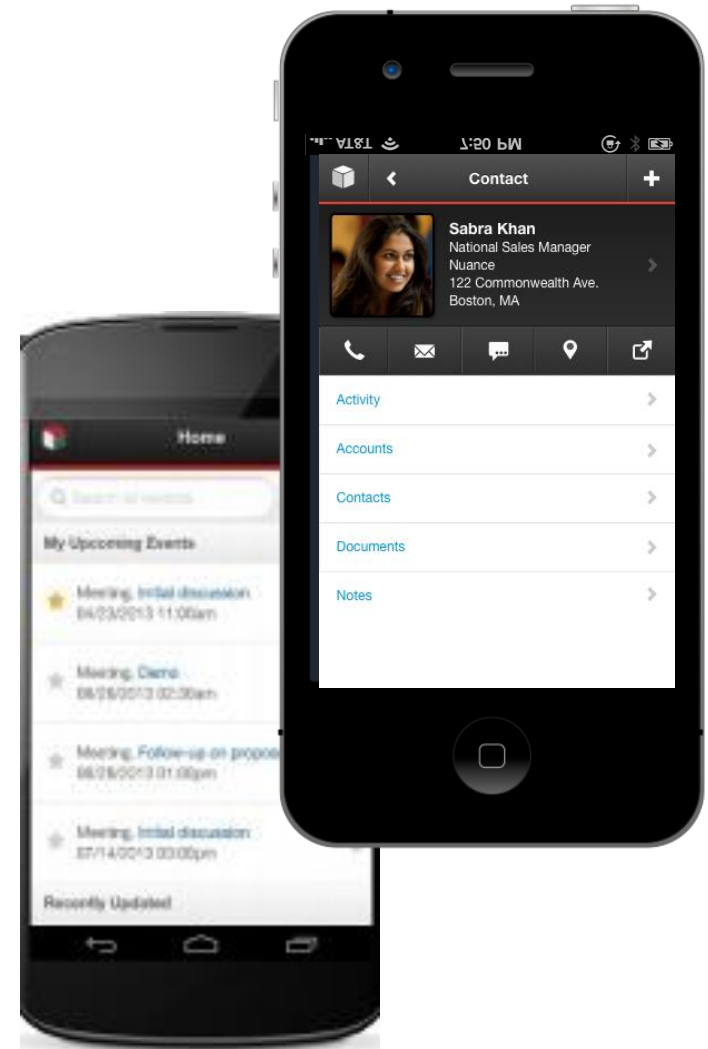
Android

Android Tablet



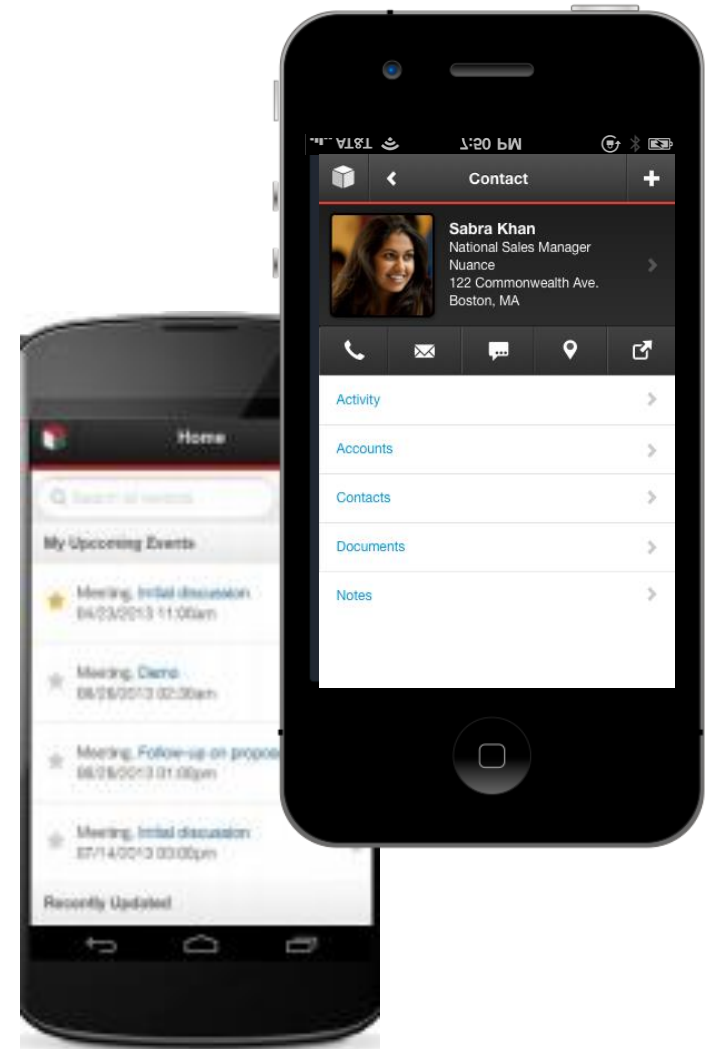
SugarCRM Mobile

- 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?



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



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?



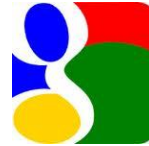
Oh, over 1000 comments on the product demo....



Do I know these guys?



Fans?
Opinions?



User groups?
Reviews?

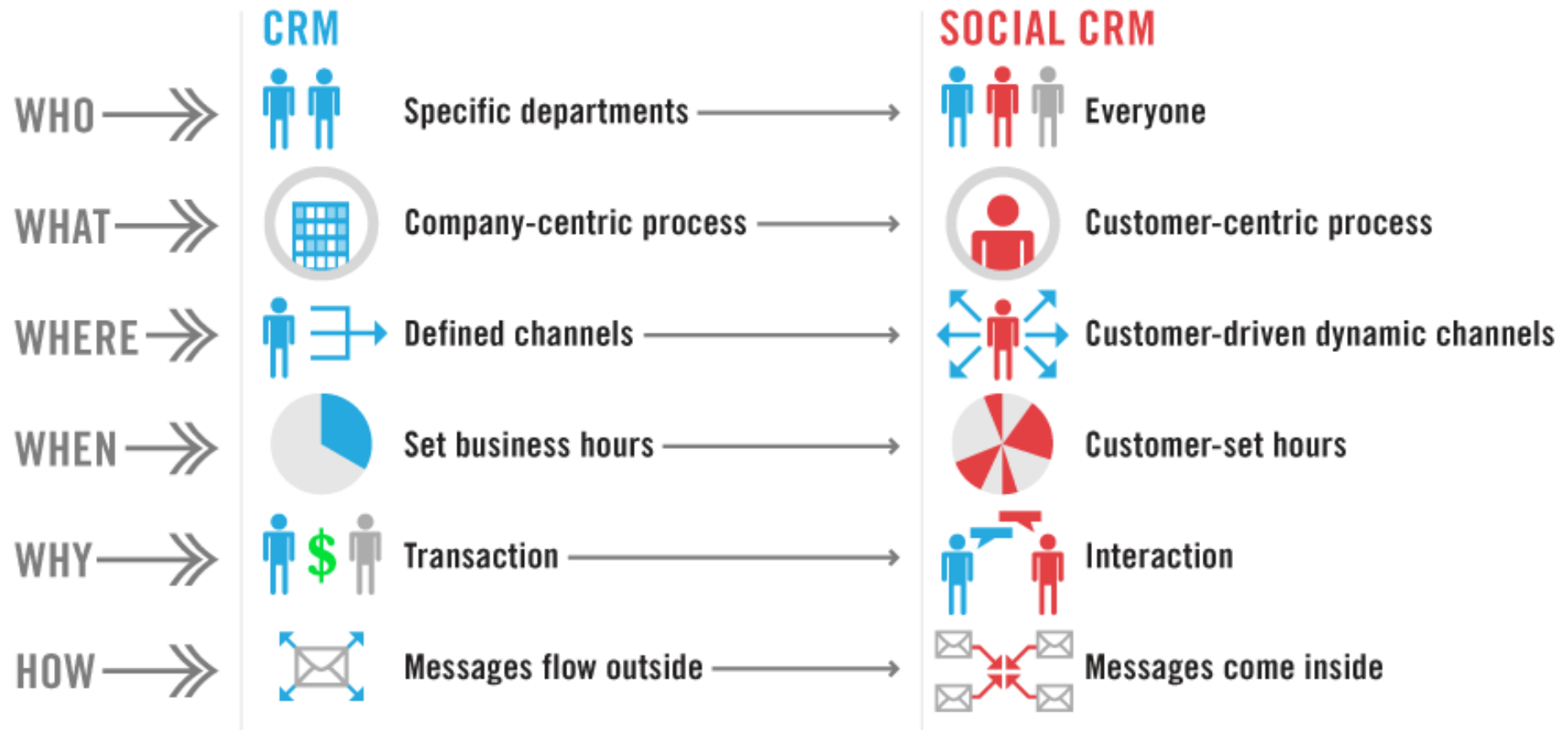


Does their blog enlighten me
In any way?





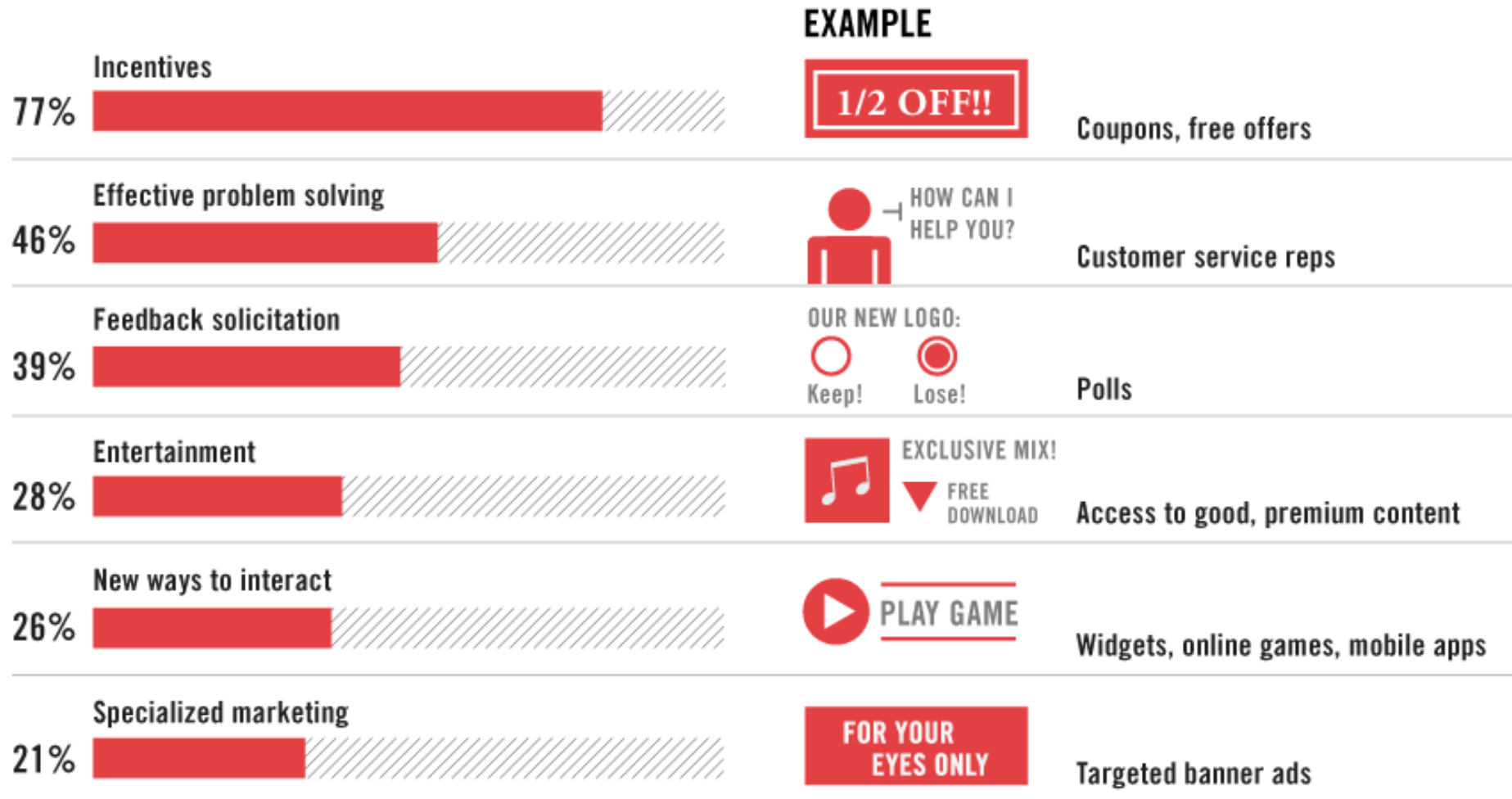
HOW CRM EVOLVED INTO SOCIAL CRM



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:



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:

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% of 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

A light gray parallelogram with a black border, containing the text 'B2C' in black.

B2B

A dark gray parallelogram with a black border, containing the text 'B2B' in white.

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....

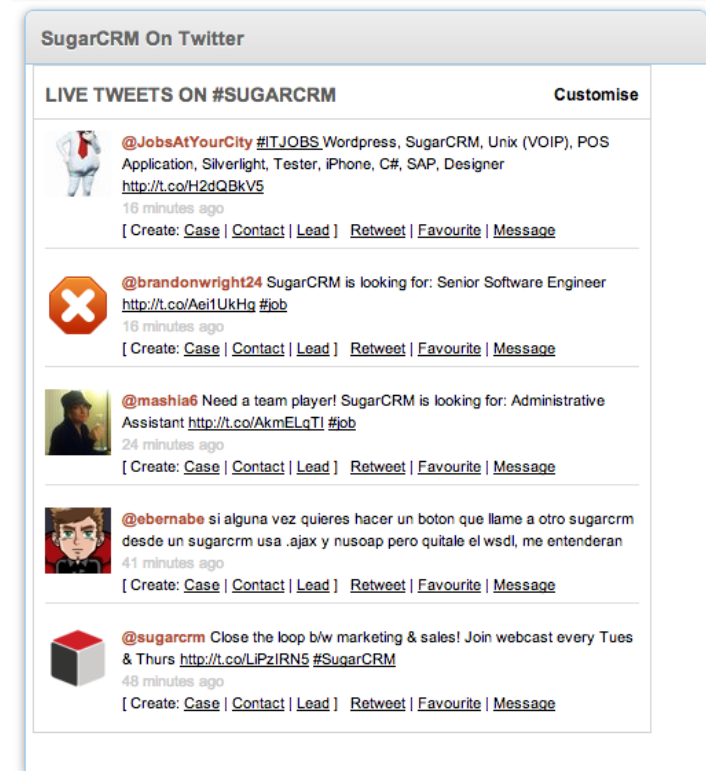


What's possible: Instant Response!

- 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 searches 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....

Search Cases

Subject <input type="text"/>					My Items <input type="checkbox"/>	My Favorites <input type="checkbox"/>	Open Items <input type="checkbox"/>	Search <input type="button"/>	Clear <input type="button"/>	Advanced Search
<input type="checkbox"/> <input type="button" value="Delete"/>										
	Num.	Subject	Priority	Status						
<input type="checkbox"/>	81	New Tweet-To-Case: Twitter user: @Billyfrid	Medium	New						
<input type="checkbox"/>	80	New Tweet-To-Case: Twitter user: @virtualization2	Medium	New						
<input type="checkbox"/>	79	New Tweet-To-Case: Twitter user: @jobomaniac	Medium	New						
<input type="checkbox"/>	78	New Tweet-To-Case: Twitter user: @Casino_101	Medium	New						
<input type="checkbox"/>	77	New Tweet-To-Case: Twitter user: @BW_Comm	Medium	New						
<input type="checkbox"/>	76	New Tweet-To-Case: Twitter user: @insideview	Medium	New						
<input type="checkbox"/>	75	New Tweet-To-Case: Twitter user: @monitor_at	Medium	New						
<input type="checkbox"/>	74	New Tweet-To-Case: Twitter user: @anahleitu	Medium	New						

New Tweet-To-Case: Twitter user: @virtualization2 ☆

Edit ▼

Overview	Tweet To Case
Case Number:	80
Priority:	High
Case Type:	A
Type:	Administration
Description:	From user: @virtualization2 Message: SugarCRM Announces New Technology Integration With VMware vFabric Application Director 5.0 http://t.co/a6KjqWBU
Resolution:	

...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.

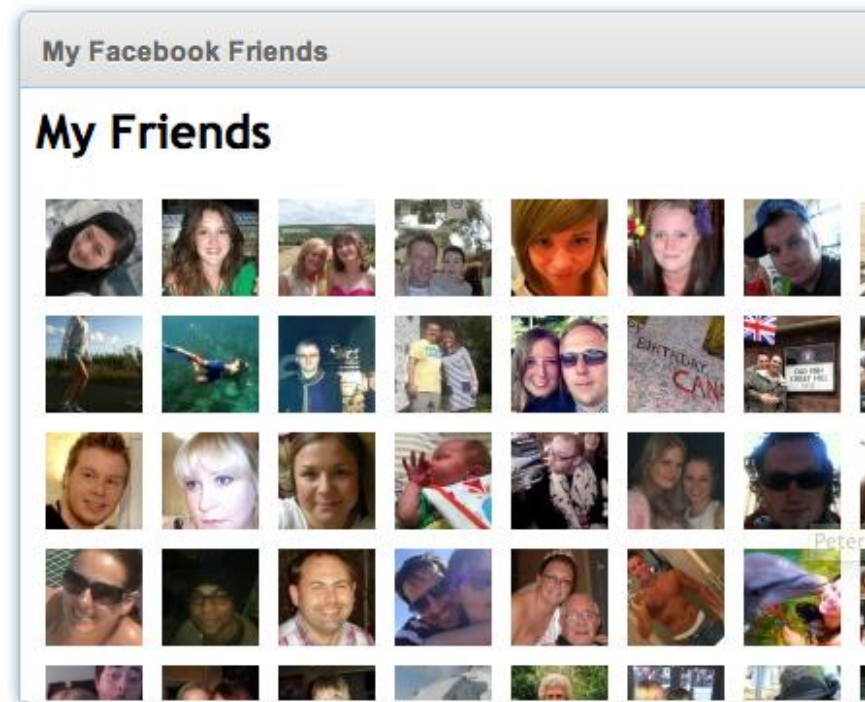
The screenshot displays the SugarCRM user profile for Clint Oram. At the top, the name 'Clint Oram' is followed by a star icon. Below this is an 'Edit' button with a dropdown arrow. A horizontal navigation bar contains several tabs: 'Overview' (selected), 'Get Clever', 'Facebook', 'Where do they live?', 'Route To Customer', 'More Information', and 'Other'. The main content area is titled 'So Very Clever:' and features a section 'Social Profiles matched to this user'. This section lists six social media profiles with their respective icons and 'Save to Sugar' buttons: Twitter (sugarclint), LinkedIn (clintoram), Facebook (clintoram), Google+ (1113313623...), Foursquare (sugarclint), and Klout (sugarclint). A 'Save All To Sugar' button is located at the bottom of this list. To the right of the list, a detailed profile for Clint Oram is shown, including a photo, his title 'Co-founder at SugarCRM', age and location '35-44 years old, male located in SF Bay Area, California', his role 'CTO & co-founder at SugarCRM. Entrepreneur, CRM & call center expert, open source evangelist, proud dad, avid traveler', and Twitter statistics '1252 followers on Twitter' and 'Following 684 people on Twitter'. At the bottom right, it states 'Knows about: Social CRM, CRM, lsp, Customer Service, Apps'.

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.

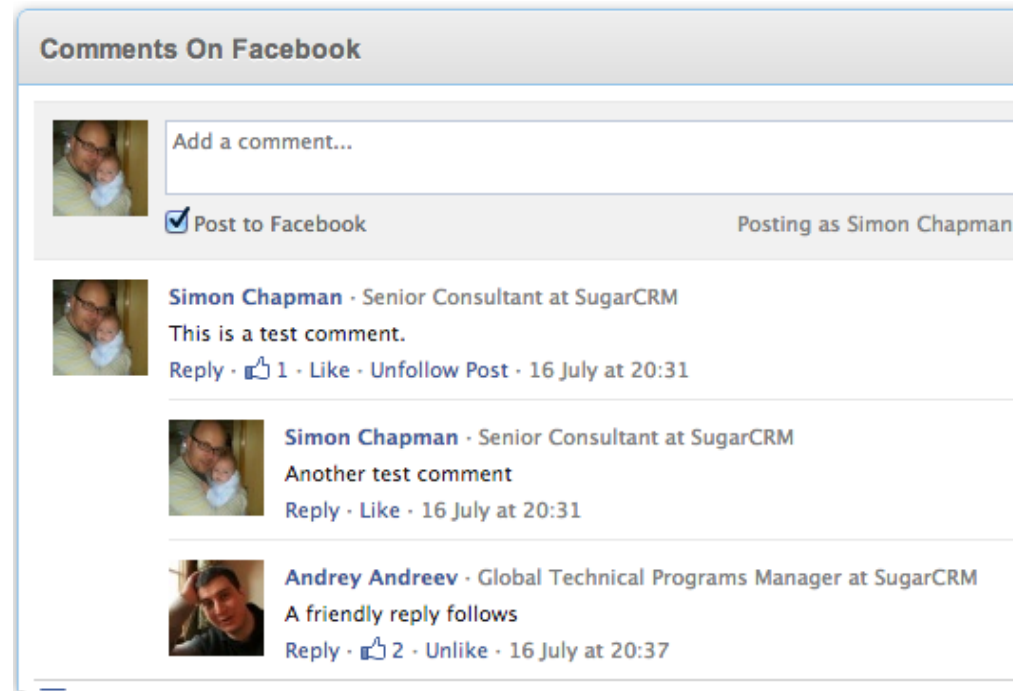


SocialCRM in Sugar: Facebook Comment and Fan Pages

- 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.

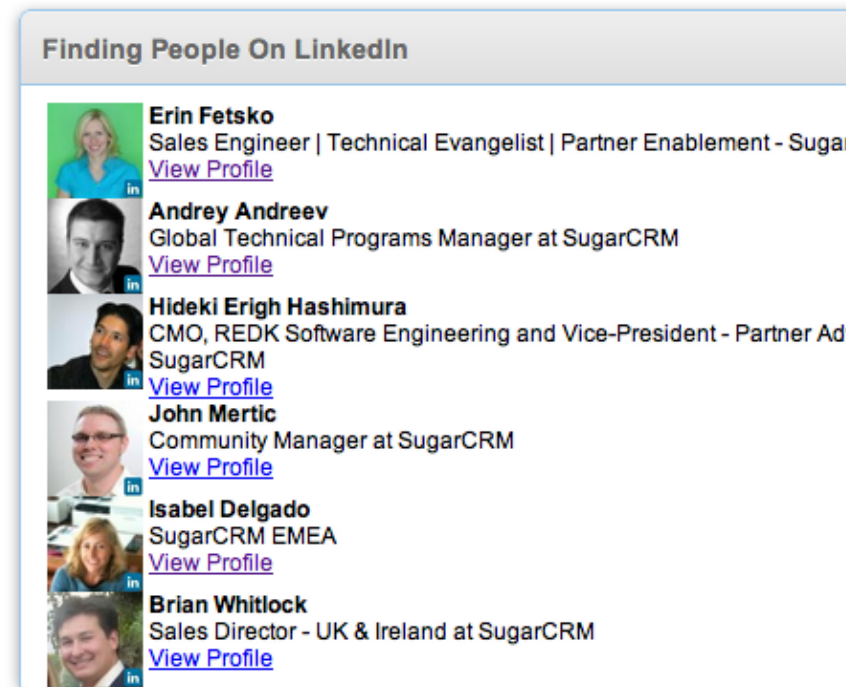


SocialCRM in Sugar: Who do I know?

- 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

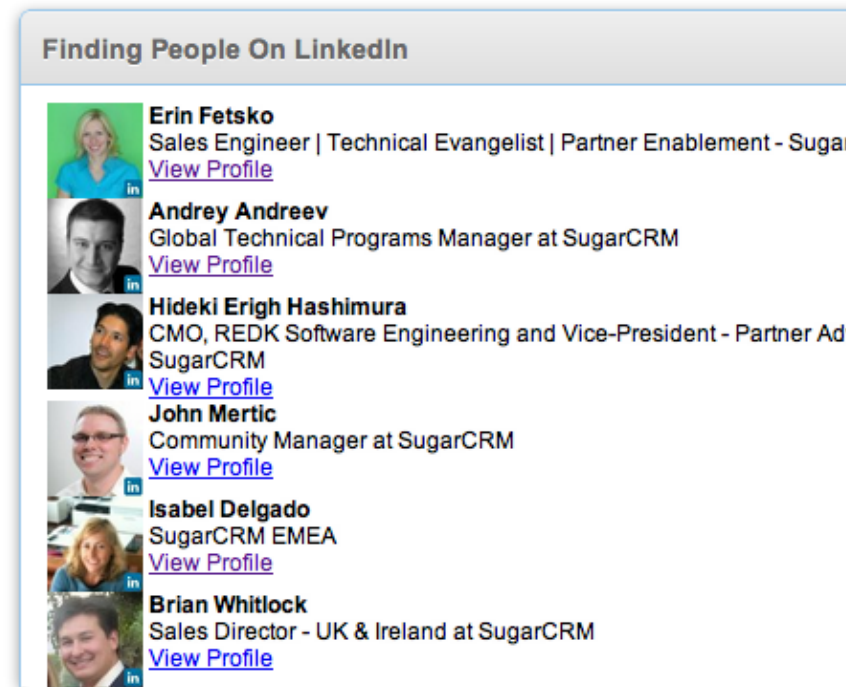


SocialCRM in Sugar: But who do they know?

- 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.

Twitter: stephenfry 

Twitter Followers / Latest Tweet:

[@TheInternsBand](#) That was the joke. And it's Stephen, not Steven ! X
22 hours ago.

 Follow @stephenfry 4.4M followers

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.

Followers Photos / List:

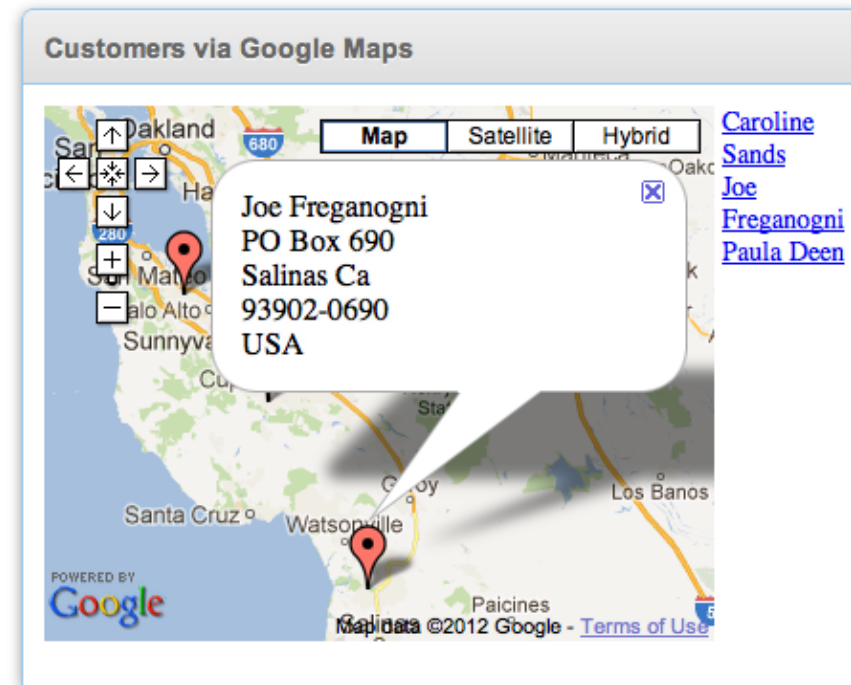


What's possible: Where do they live?

- Integrates with Sugar's API
- Loads Google Maps Javascript API
- Drops pins on each matched address 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.

Route From Office:

Map data ©2013 Google - [Terms of Use](#) [Report a map error](#)

Print Directions

A 1 Church Lane, Old Buckenham, Attleborough, Norfolk NR17 1RP, UK

9.8 km - about 15 mins

1. Head west on Church Ln toward Crown Rd	0.1 km
2. Turn left onto Crown Rd	90 m
3. Take the 1st right onto Attleborough Rd/B1077 Continue to follow B1077	4.8 km
4. Turn left onto Connaught Rd/B1077	0.3 km
5. Sharp right onto Exchange St/B1077	0.2 km
6. Slight left onto B1077	3.7 km
7. Turn left onto Chequers Ln	0.4 km
8. Continue onto Long St Destination will be on the left	0.3 km

B 10 Long Street, Great Ellingham, Attleborough, Norfolk NR17 1LL, UK

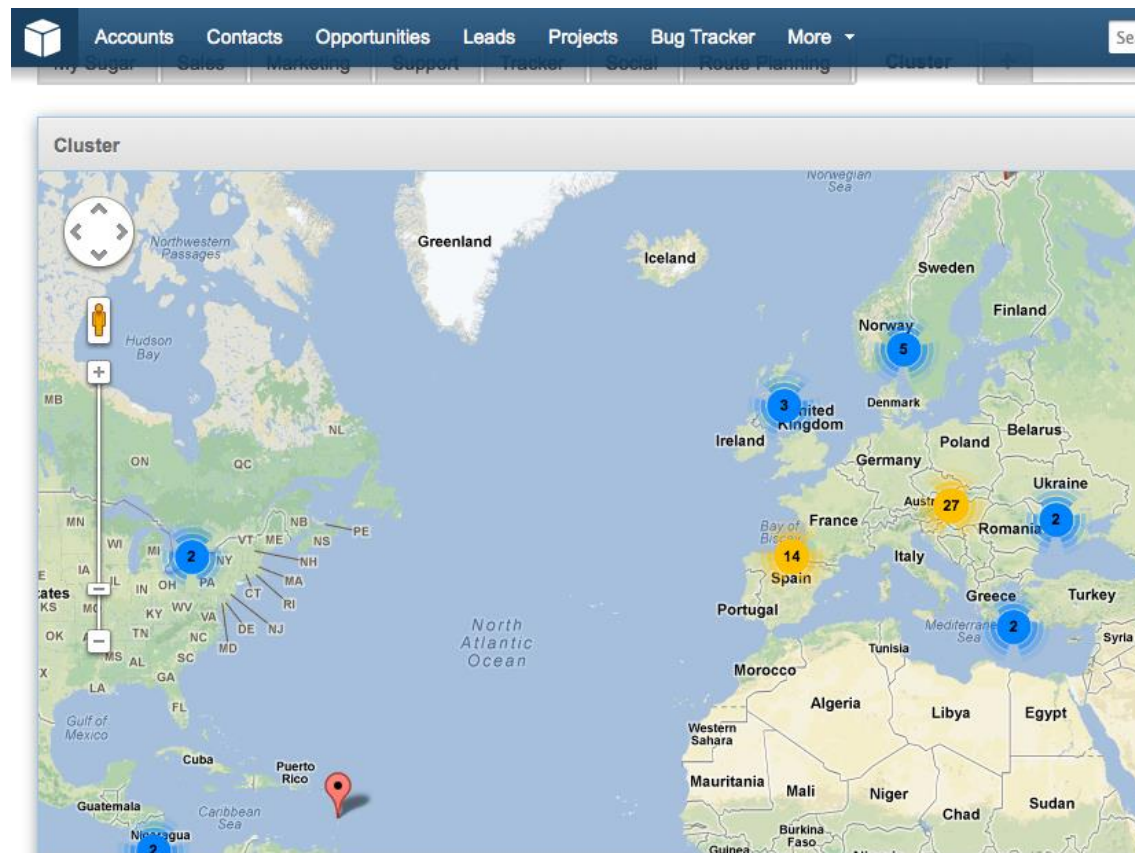
Map data ©2013 Google

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.