



SUGARCRM

Helsinki 25th of November 2014

Topics:

Corporate Overview:

SugarCRM at a glance

SugarCRM Case Studies

IBM Sales Connect Using Sugar

PostNord

Company Snapshot

- The fastest growing CRM vendor in the world
- 20+ consecutive quarters of growth
- CRM vendor for the largest CRM deployment in the world
- Founded in April 2004 with headquarters in Silicon Valley
- 400+ employees and contractors worldwide
- 1.7M+ users rely on Sugar in 120 countries and more than 27 languages
- Global strategic partners extend breadth of offerings
- Recognized CRM leader by industry analyst firms



We put the “i” in
CRM



Flexible Architecture = Future Proof CRM



Deep Customization

- Sugar Studio
- Access to code

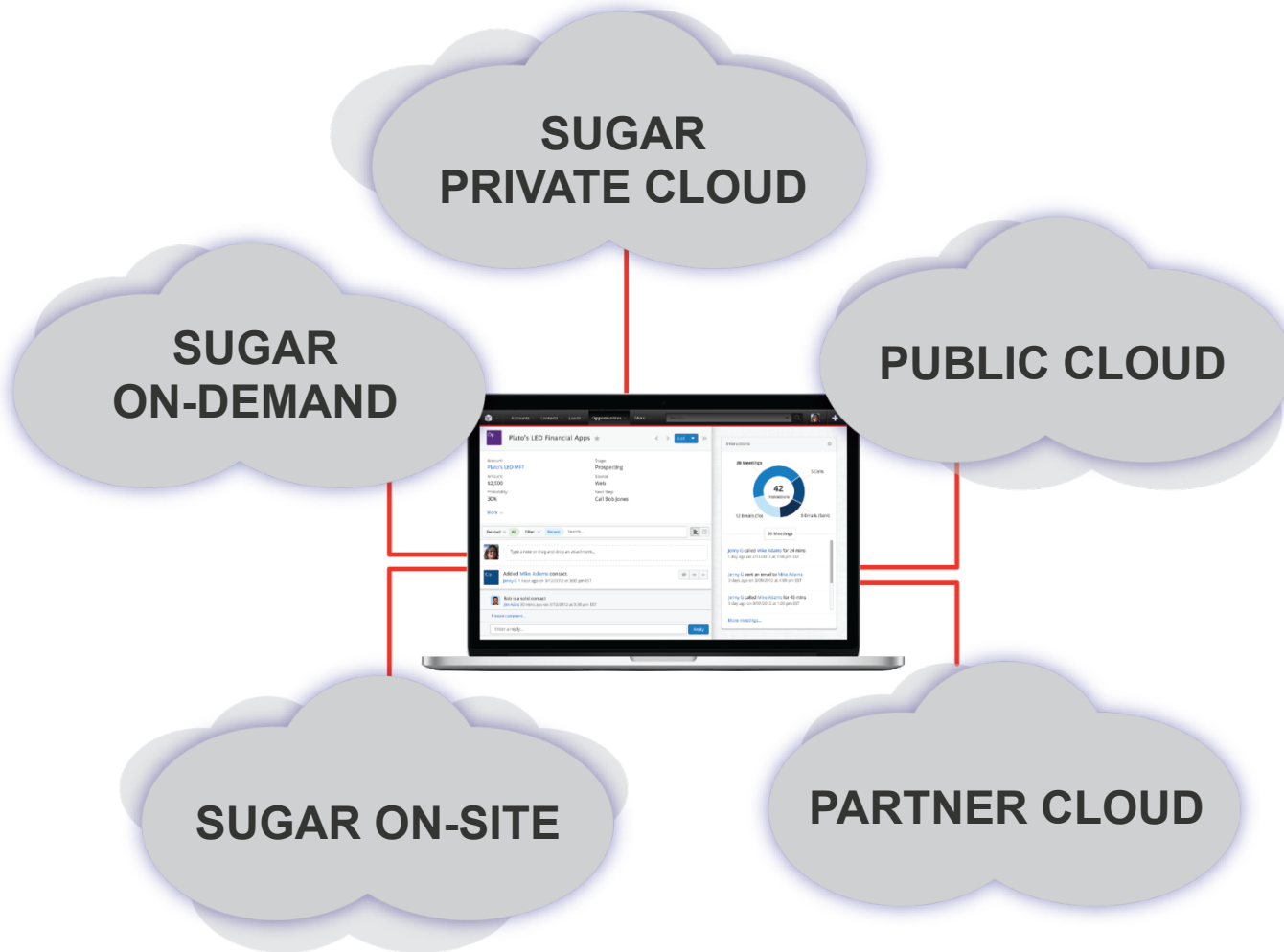


Integration

- Well documented SOAP, REST APIs
- No limits to API calls

Sugar UX

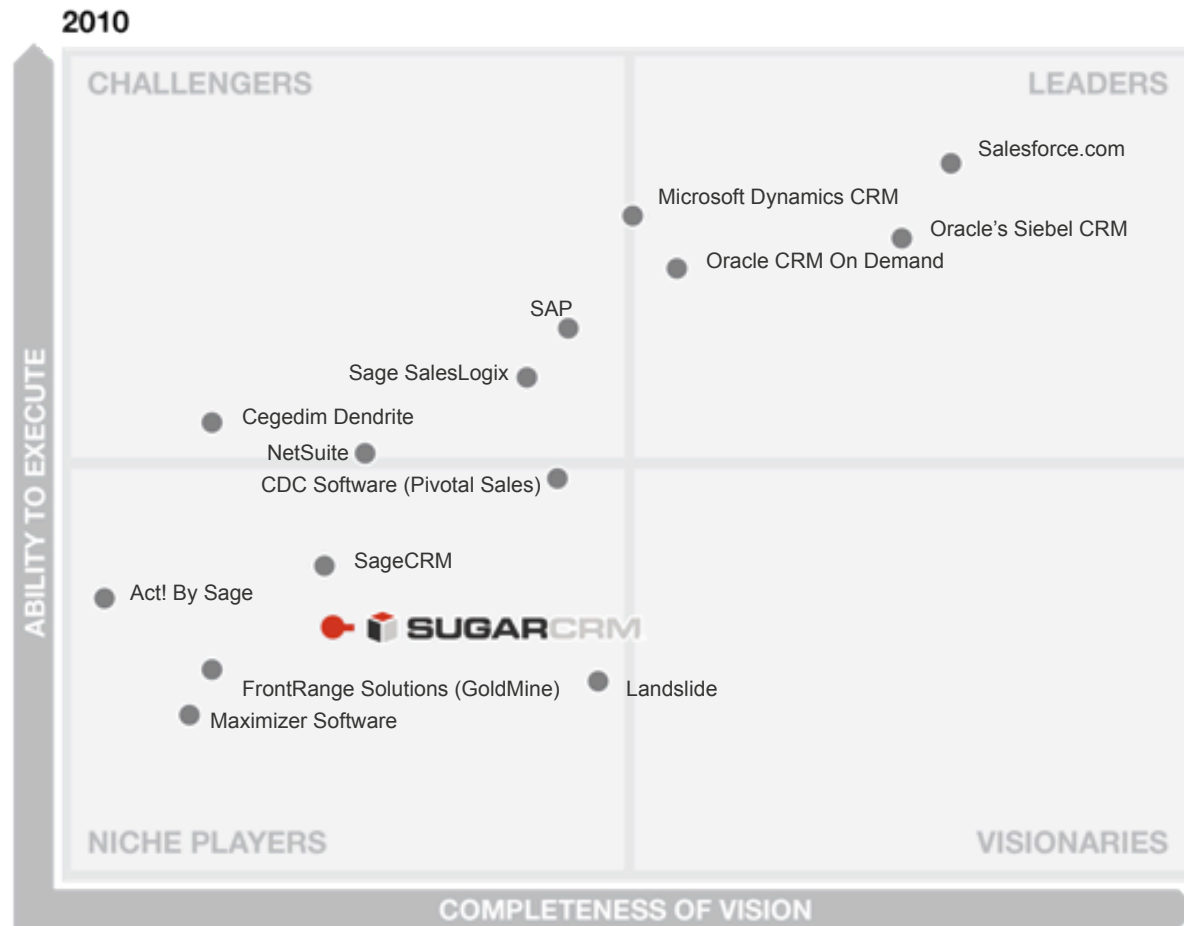
Delivered the Right Way for Each Organization



Market Positioning

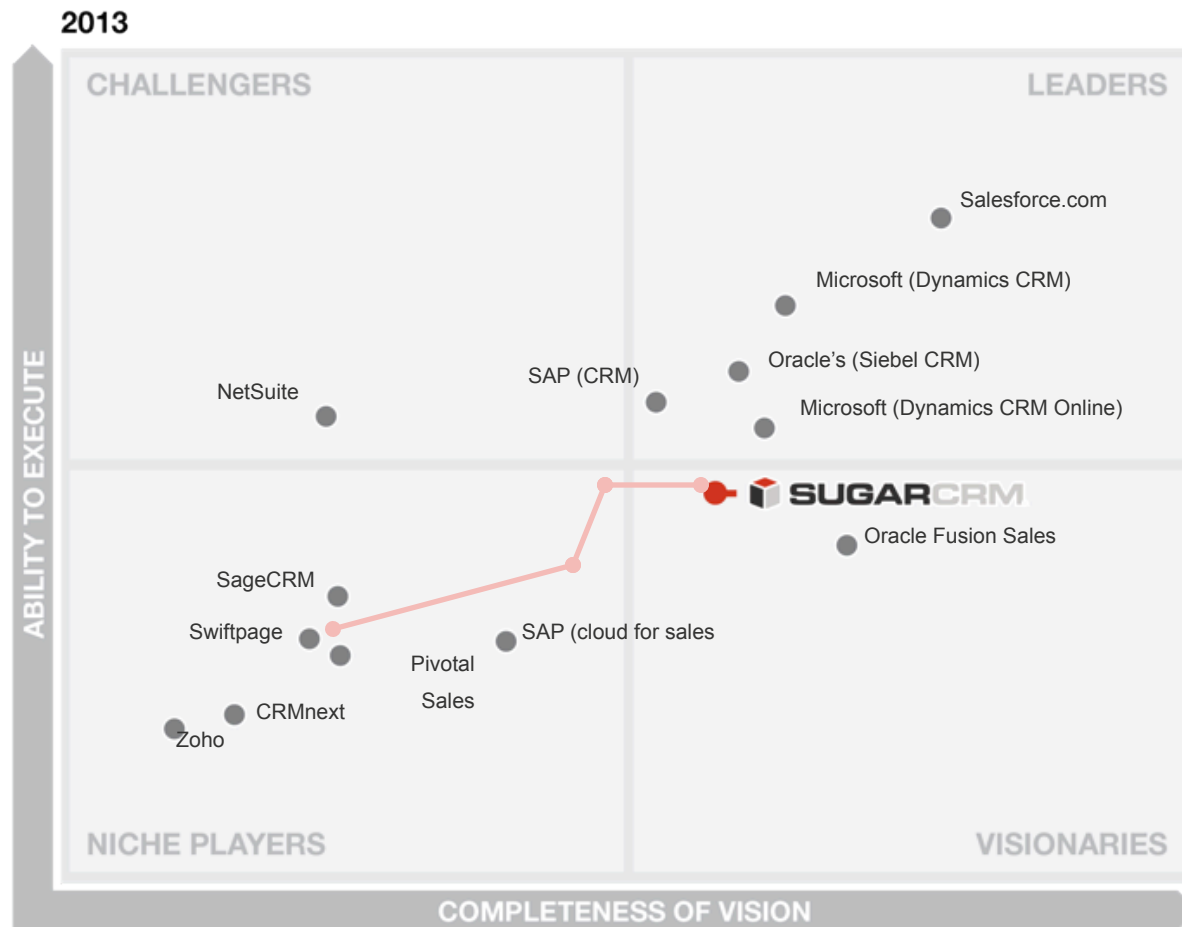
Gartner Magic Quadrant – MQ 2010

First year SugarCRM ranked by Gartner



Gartner Magic Quadrant – MQ 2013

Significant movement; validation as a CRM Visionary



Gartner Magic Quadrant – MQ 2014



Successful Customers

More than 1.6 Million Users

Services



Consumer Goods/ Retail



Financial Services & Insurance



Government/ Non-profit



Education



Healthcare



Manufacturing



Technology



Transportation



Travel & Leisure





CASE STUDY

IBM Sales Connect

SalesConnect brings CRM to the next level . . . enabling sellers to be more efficient, more social, more analytical

SalesConnect helps IBM sellers improve client experience through

Timely and
accurate client
information

Powerful and
precise
opportunity
tracking

Collaborative
selling, leveraging
cumulative IBM
expertise

Efficient access
and interface to
optimize time in
the field

Client insights and
analytics for
better decision
making



Before CRM

Legacy CRM Tool

SalesConnect

**– IBM OM Tool –
No CRM:
Opportunity
Management
only**

**– CRM
Implementation–
Brought CRM to
sellers, but key
limitations inhibited
evolution**

**– SalesConnect –
Socially enabled
selling, leveraging
analytics and the
best of current
technologies**

***SalesConnect empowers sellers and engage
them to become enterprising individuals***



SalesConnect is IBM's simple Selling Platform designed to enable our seller with integrated information, rich analytics, mobile and social



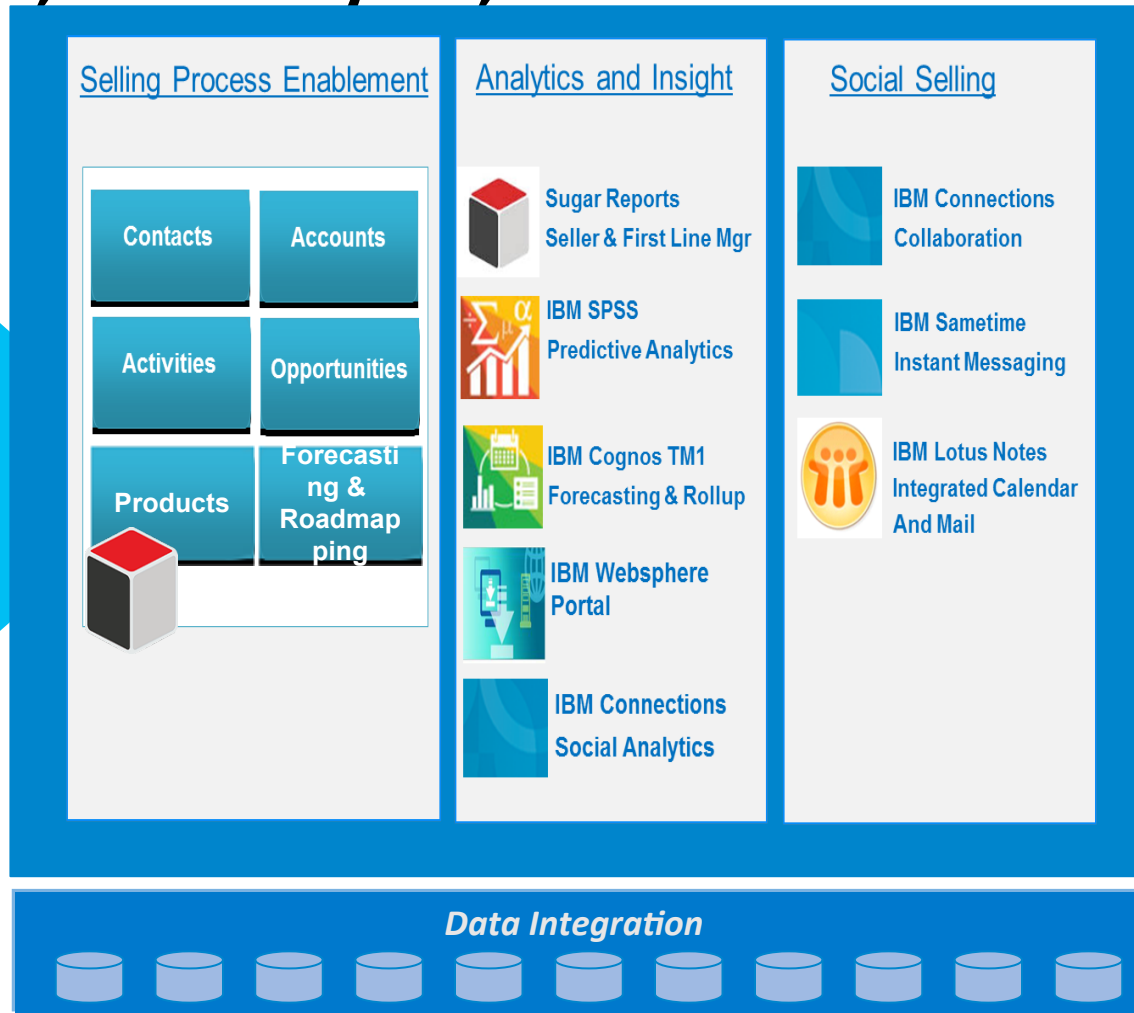
Mobile



Notes



Browser

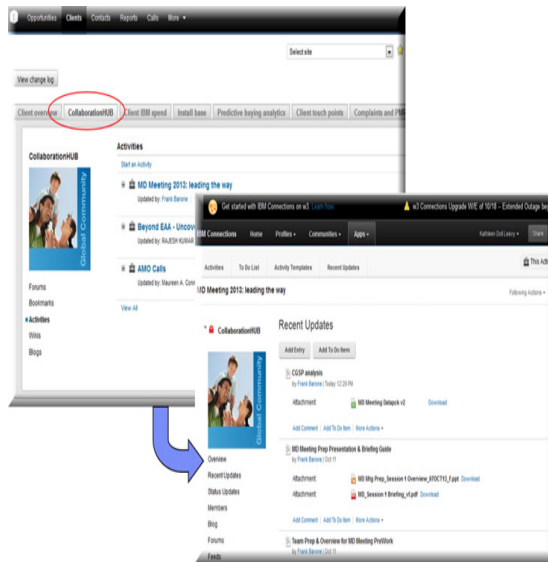


Simple...

Integrated...

Analytical...

SalesConnect brings a social dimension to selling . . . internally *and* externally to prioritize time and resource



SalesConnect provides an *integrated, social experience* for Sellers as well as those beyond:

- ➔ Client oriented collaboration among teams
- ➔ Follow key clients / opportunities
- ➔ Activity Streams (news feeds)

- Shared practices
- Find Experts
- Industry / brand knowledge
- Client Growth Strategy
- Proposals and references
- Global client information (non-confidential)

Sellers use *tagging* to group sales data in ways meaningful to them



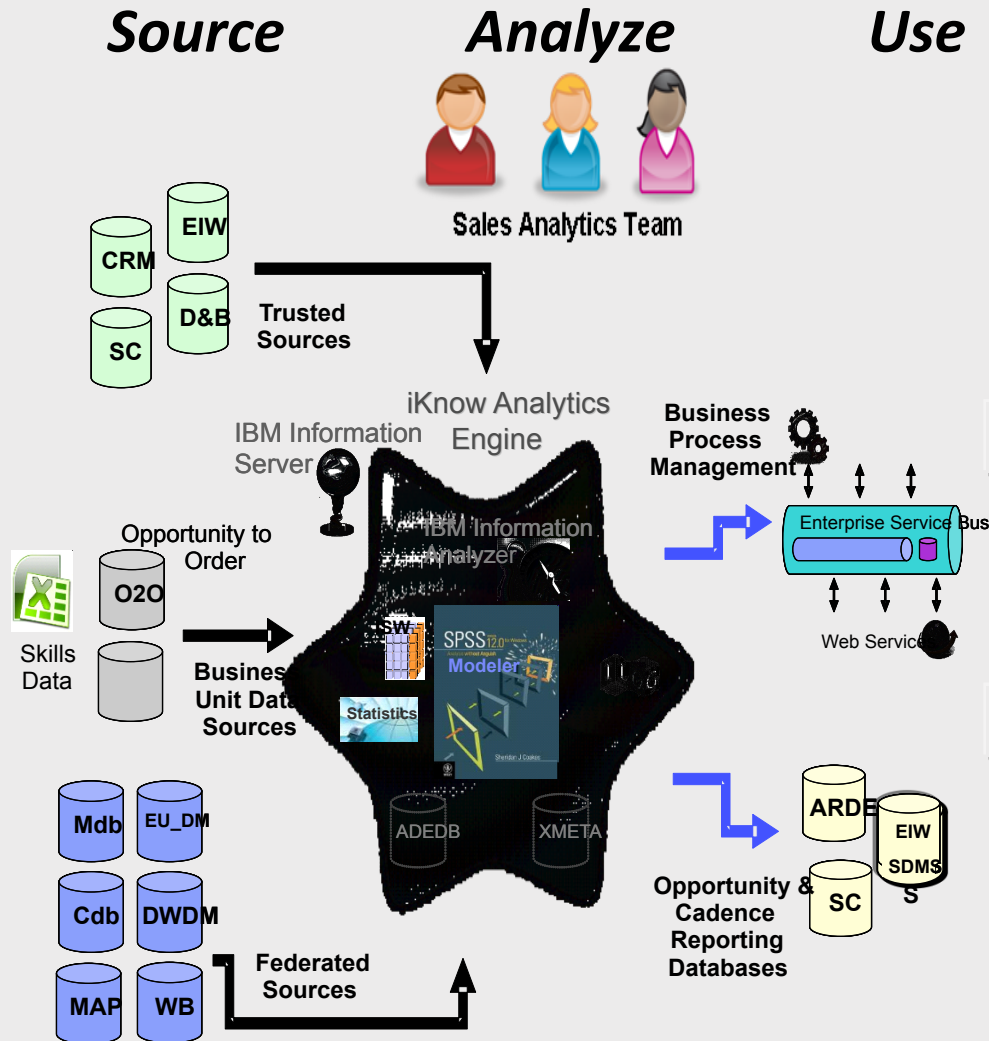
40,000 IBMers unite in 400+ Client Collaboration Hubs to come together as one team for their clients

SOCIAL

Critical Business Outcome

*An optimal social business experience resulting in highly engaged employees delivering a **differentiated experience** to our clients*

The complex analytics data model must be transparent to selling teams.... who only focus on the insights and results



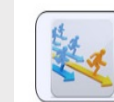
Some predictive variables

- Seller skills
- Progression of the deal
- Speed of deal progression
- Technology components of deal

... And we make it easy for Sellers to find

Probability *	Sales stage	P2C ?	Roadmap status *
10%	05-Qualified/Ga...	1	Stretch

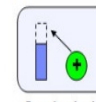
... And we embed in reports for Managers to manage



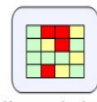
Competitive Analysis



Cross-sell Analysis



Gap Analysis



Heatmap Analysis

SalesConnect is the key enabling tool for all IBM Sellers and Sales Leaders that helps ensure a consistent approach to sales-related activities

Intersection of IBM's Sales Management System and SalesConnect

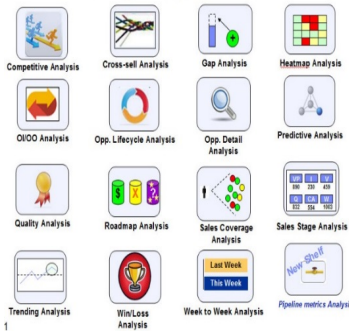
Common Reports

Top Sheet
Exec
Summary



Pipeline
Reports

Analytical Library

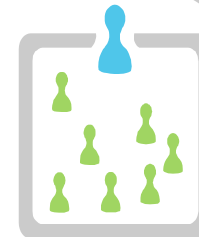
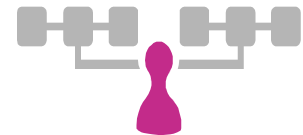
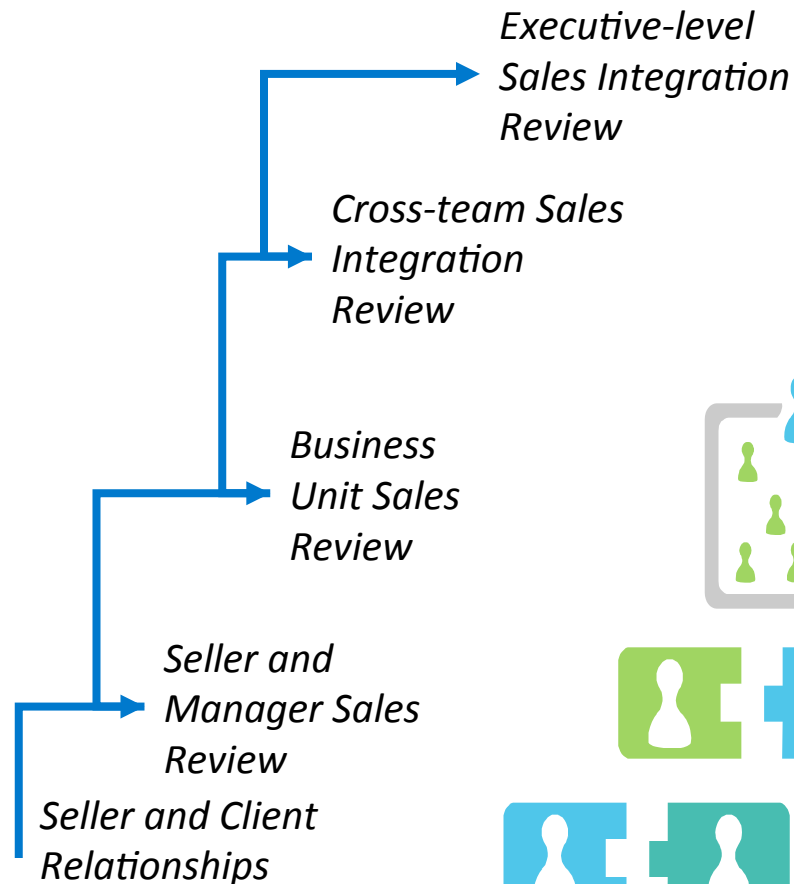


Seller/Manager Reporting

WinPlans



Steps to
Closure
Integrated Deal
Comments



SalesConnect



IBM applied Agile Methodology for speed and engaged leaders across our business units and Geos to ensure readiness and change

FAST

- Pilot Aug 2012
- Pilot Refresh July 2013
- Globally R1 Summer 2013 (6 weeks)
- Globally R2 July 2014 (one deploy)
- Global Cadence August 2014 (one deploy)



- Run Globally
- Performance KPI
- Data Privacy Compliant

PARTNERSHIP



Tiered Engagement with Sales Leaders

	Brands			
	STG	SWG	GTS	GBS
Global				
IOT				
IMT				
IC				
Enterprise				
BP				
Ina Sales				
IGF				

Governance focused on Execution of Vision

- Scorecards measured country readiness to deploy



- Progress of adoption of behavior

HIGH TOUCH

32 Regions: personally visited 1-3X
150 General Managers Briefed & Engaged
500 Sales Leader Meetings hosted
200Q Sellers in Roundtables

GLOBAL

2.1 M Total Opportunities
 754 K Client Interactions
 265K Tags; 450K tasks tracked
 7000 Communities

SIMPLER

51→1

Process/ Tools converged to 1

50%

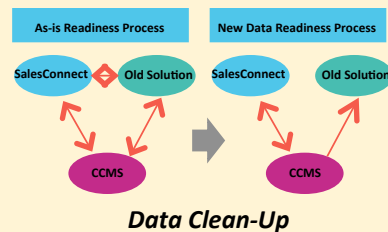
Fewer Input Fields

AGILE



"Course correction more important than perfection"

DATA FOCUS



Parallel Focus on Data Readiness

834K Opportunities
 650K Accounts
 Forecast Hierarchies
 Targets

749K Contacts

IBM is seeing indicators of saved time, better information access and more efficient processes through collaboration and analytics

*CRM + Social + Analytics =
Improved Results*



Less Time – Increased Sales Productivity

- Less time on updating and more time on WinPlans
- Faster access and speed in sharing
- Quicker and easier searching
- More timely updates

More Efficient Work and Collaboration – Better Business Impact

- More accurate forecasts and reports
- Analytics to leverage full breadth of IBM
- New insights thru greater peer visibility
- More cross-geo, cross-team collaboration

Better Access – Improved Decision Making

- Team enabled assessments
- Facilitated executive advice to get work done
- More engaged users for continuous improvement

Reduced Support Costs – More Profit

- Investments in technologies with benefits
- Cost of multiple tools vs. one tool
- Cost of common vs. stand-alone reports

Valuable lessons learned as IBM made SalesConnect a reality to open markets to commerce, minds to new ideas and our selling teams to act



*“A day will come when there will be no battlefields, **but markets opening to commerce and minds opening to ideas.**”*

Victor Hugo, August 1849

- 1. Define early a master data strategy and a vision of benefits and expected behaviors**
- 2. Design and integrate the user experience from a sellers' perspective and involve them throughout**
 - Engage the business at all levels and frequently - make them part of the solution
- 3. Use an agile approach; remain flexible and change with business dynamics**
- 4. Develop a tightly knitted Change Management plan of action**
 - Mitigation plans to address change impact, messaging, communications, education, stakeholder management, feedback, measurement and improvement
 - Reminder: Transformational change is marathon not a sprint!
- 5. Adoption is key to success...but, it takes leadership and commitment**
 - Expect faster adoption on items that are “required” - the rest requires work to convey ‘what's in it for me’ and role-model and motivate behavior change

CASE STUDY

PostNord

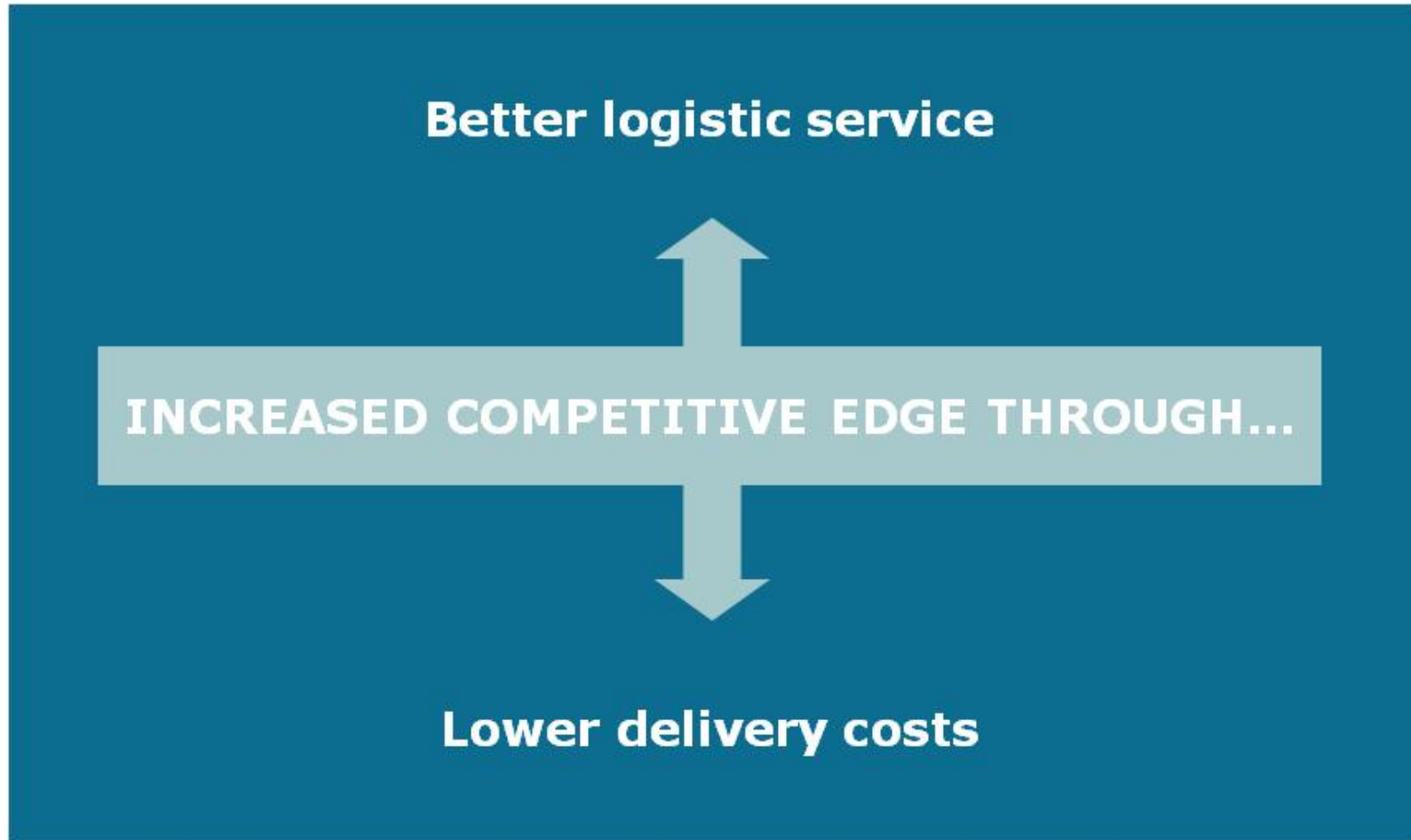


TOLLPOST GLOBE IN BRIEF

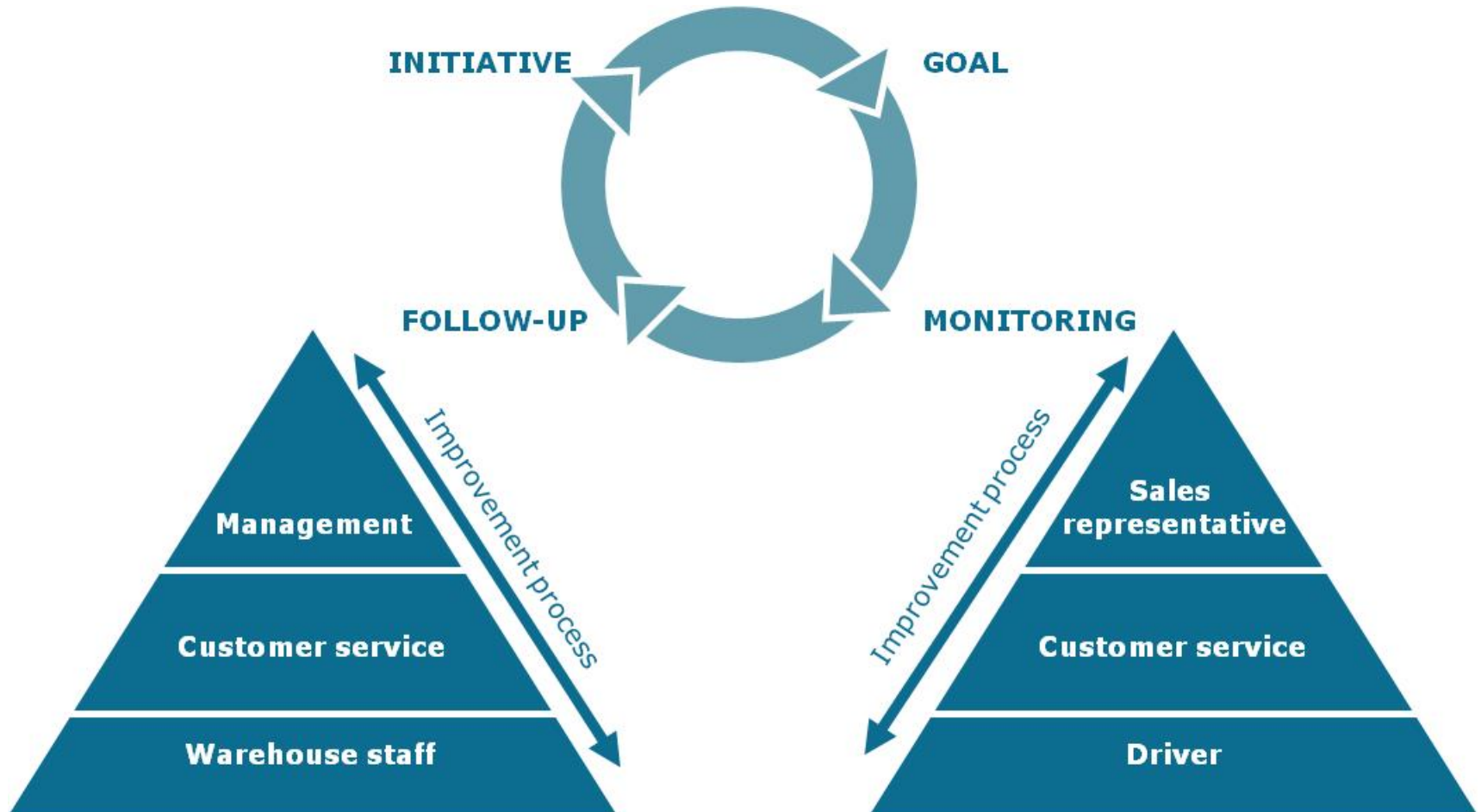
- Leading logistics provider
- Yearly revenue €550 000 000
- 1600 employees including 400 drivers
- Subsidiary of PostNord
 - Swedish and Danish Post
 - 5,5 billion in yearly revenue
- 500 SUGARCRM users



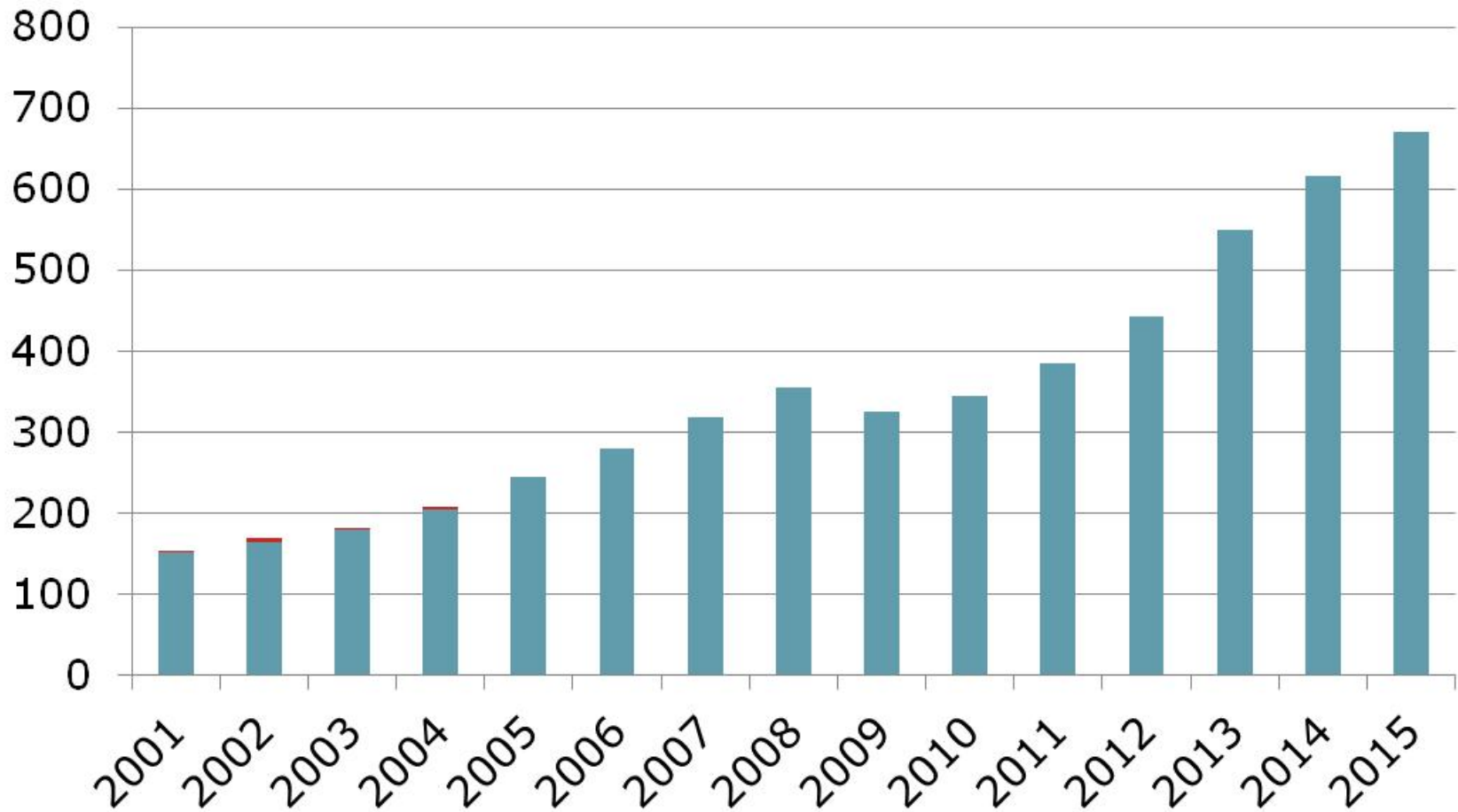
COMPETITIVE EGDE



COMPETITIVE EGDE



The Post Nord Journey



CUSTOMERS



Das Auto.



Ren kjøreglede



LA REDOUTE



the global specialist
in energy management

KLINGEL



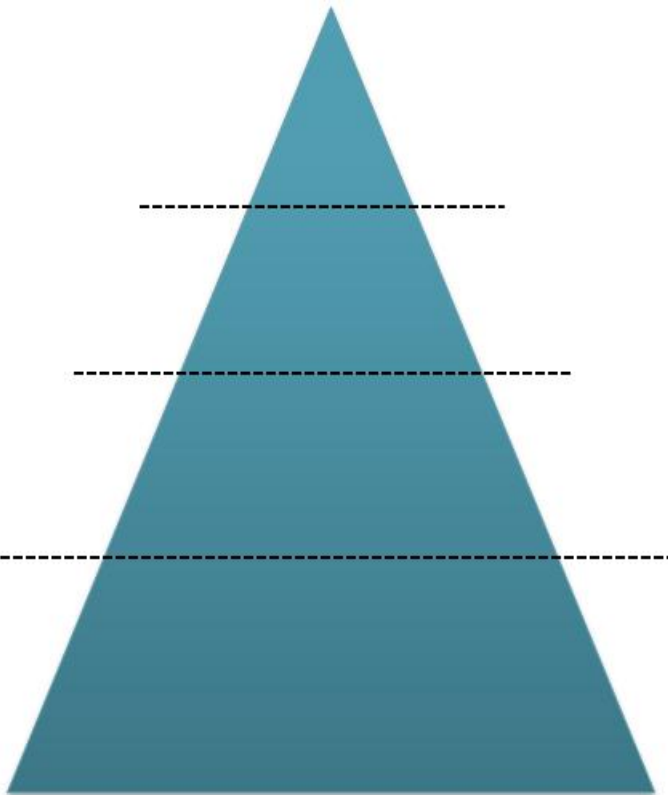
CITROËN



TOYOTA



A Platform for Growth



VIP service	Strategic Partner Program
Contact strategy	FUTURUM
Customer teams	Customer consulting
Top management contact	Value chain analytics
Service level agreement	Control tower

Sugar – The obvious choice

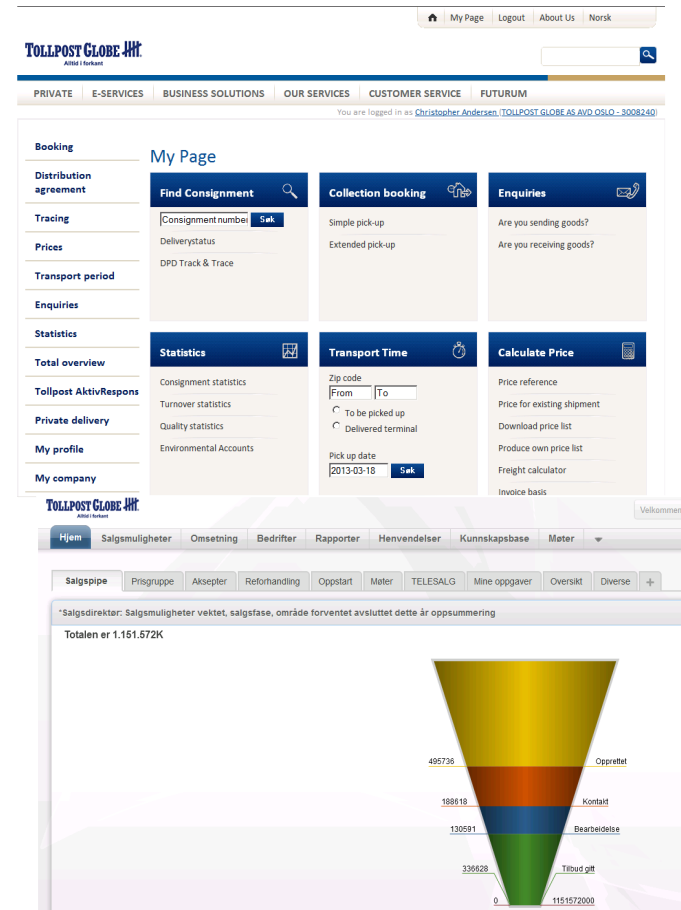
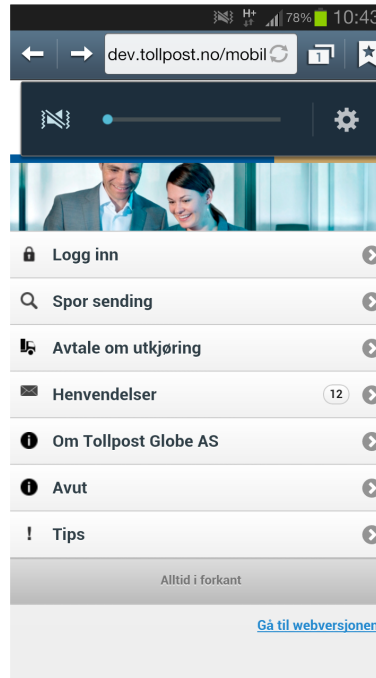
- From Siebel to Sugar
- TCO
- Flexible
- Professional partners

SIEBEL



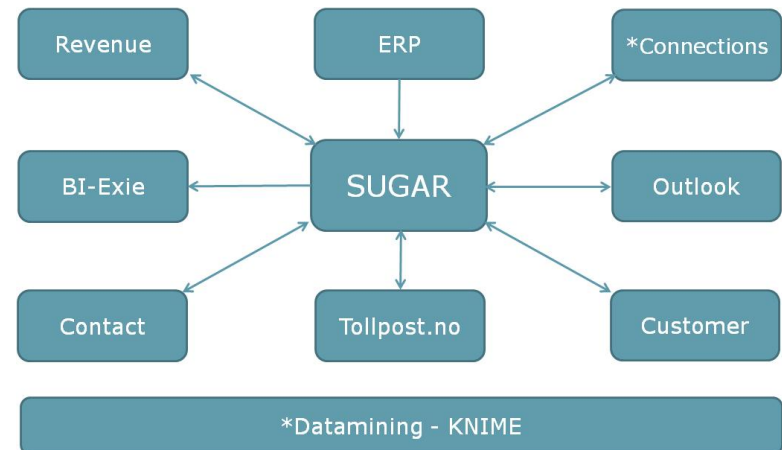
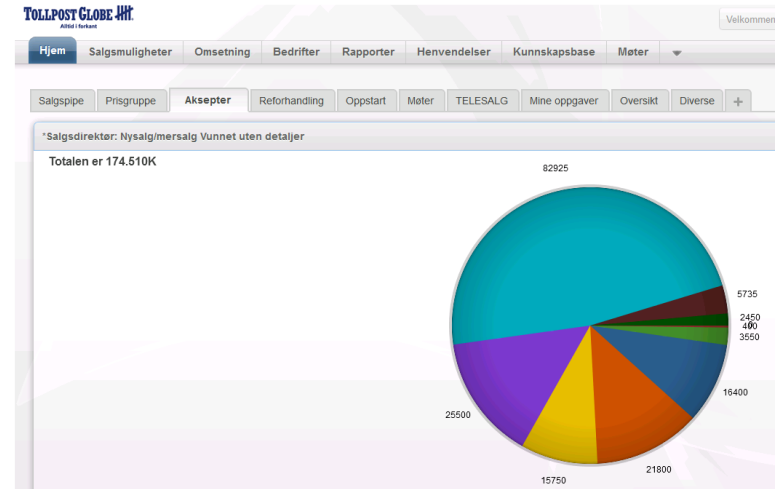
Improved Service Powered by Sugar

- E-services
- Requests
 - Including statistics
 - Fully integrated with Sugar
- SLA
- Internal communications

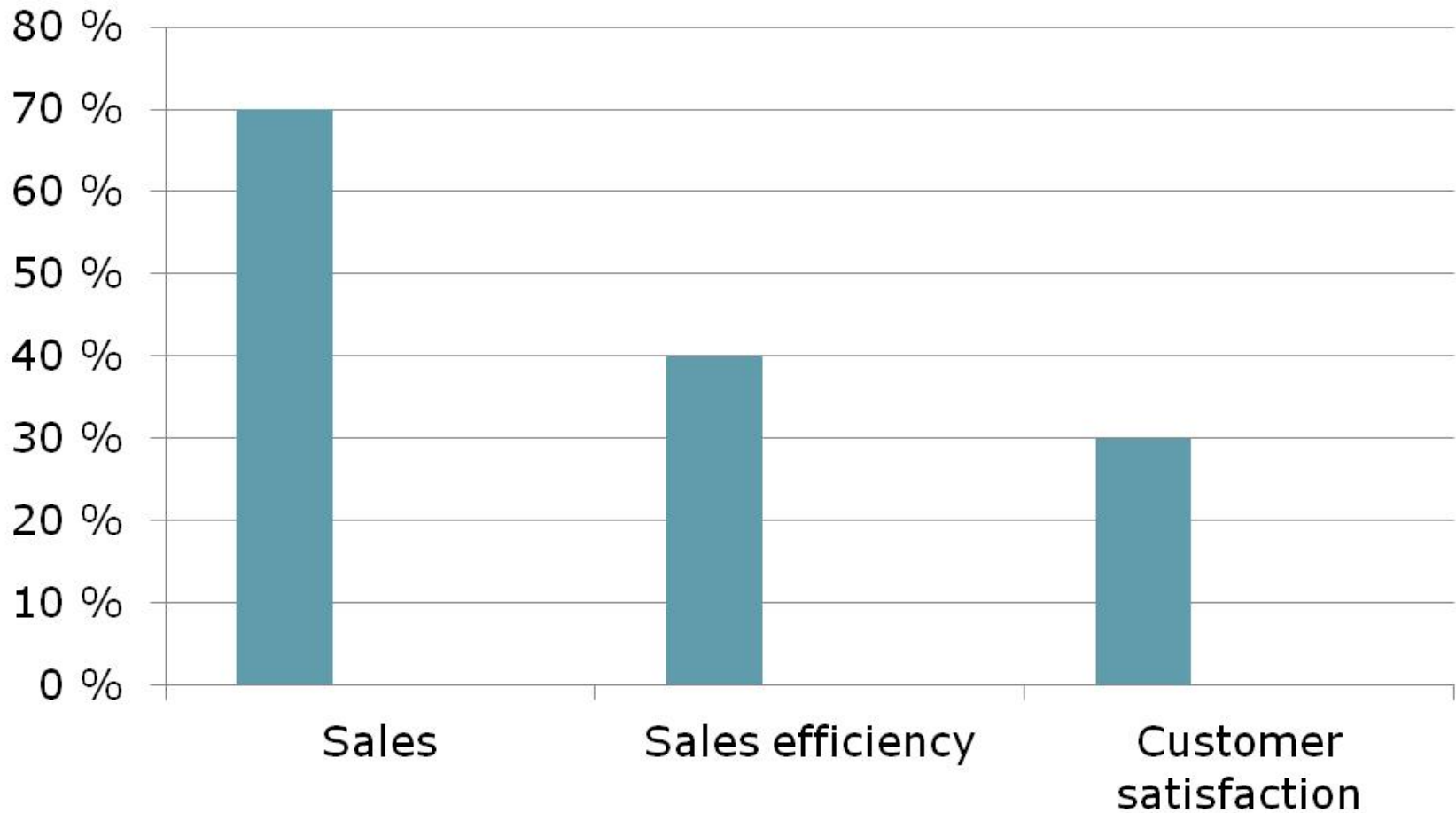


One View of the Customer

- Activities
- Documents
- Requests
- Revenue
- SLA
- Loyalty program



SOME MEASURES OF SUCCESS



Thank You!