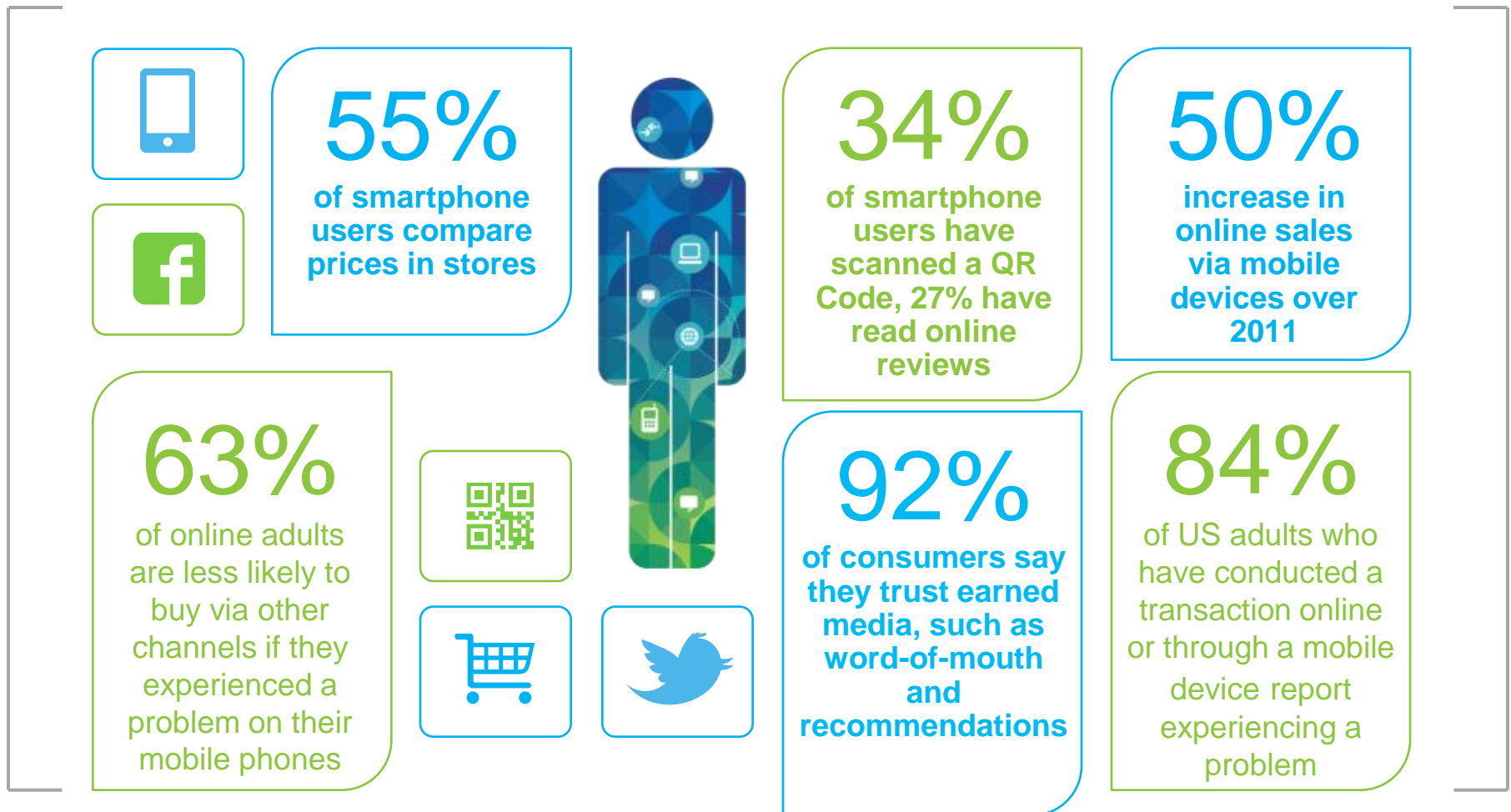


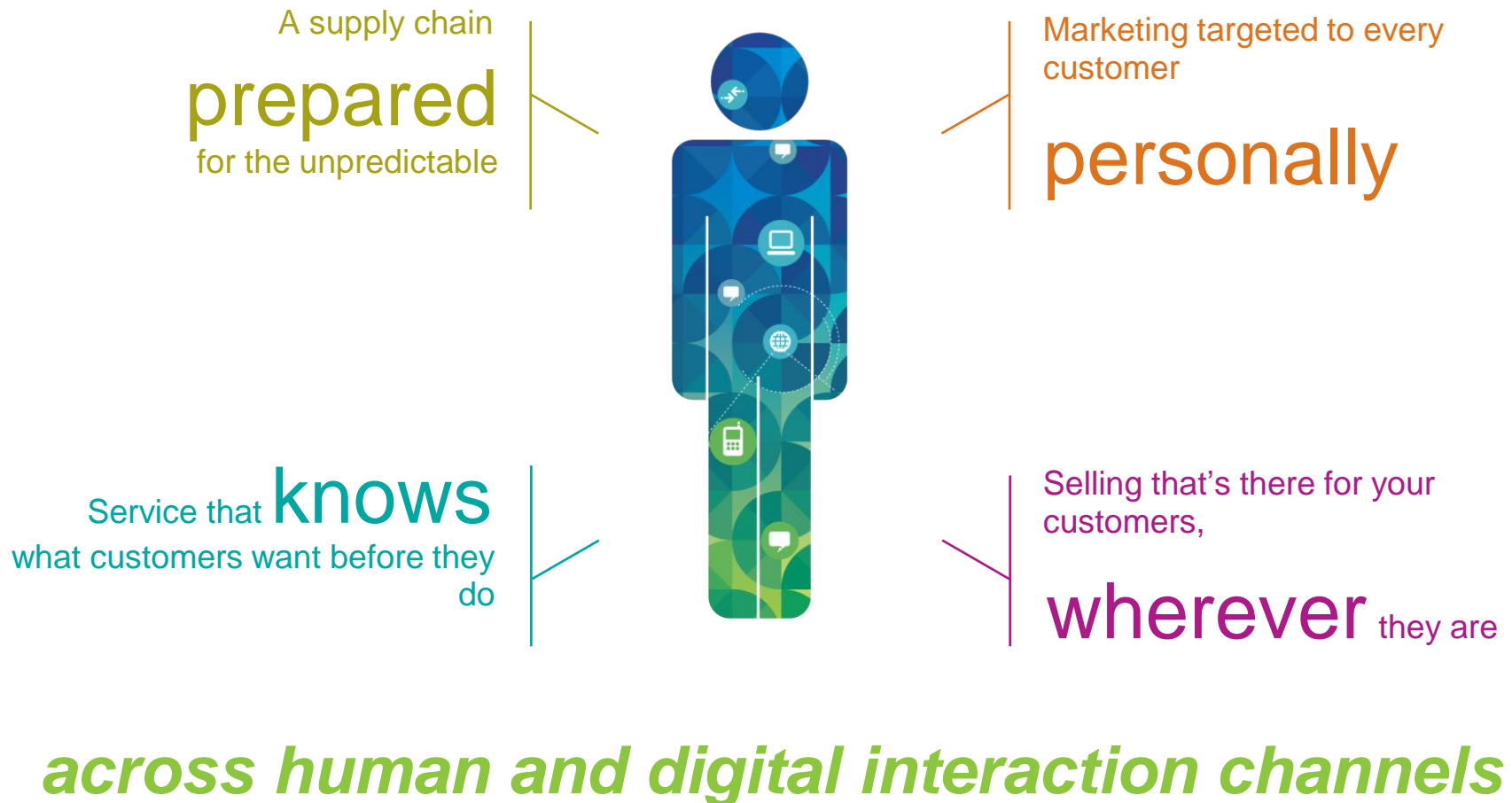
IBM Smarter Commerce and



Mobile and social technologies are reshaping business



Leaders are redefining the value chain *around the empowered customer*



At IBM, we call the path forward Smarter Commerce:
*placing the **customer at the center of your business***

Buy

*Adaptive
procurement
and optimized
supply chain*

Market

*Targeted and
personalized
marketing
across all
channels*

Service

*Anticipate
behavior and
deliver flawless
customer
service*

Sell

*Seamless
cross-channel
customer
experience*



SugarCRM extends IBM Smarter Commerce to *customer-facing individuals*

Buy

Adaptive procurement and optimized supply chain

Market

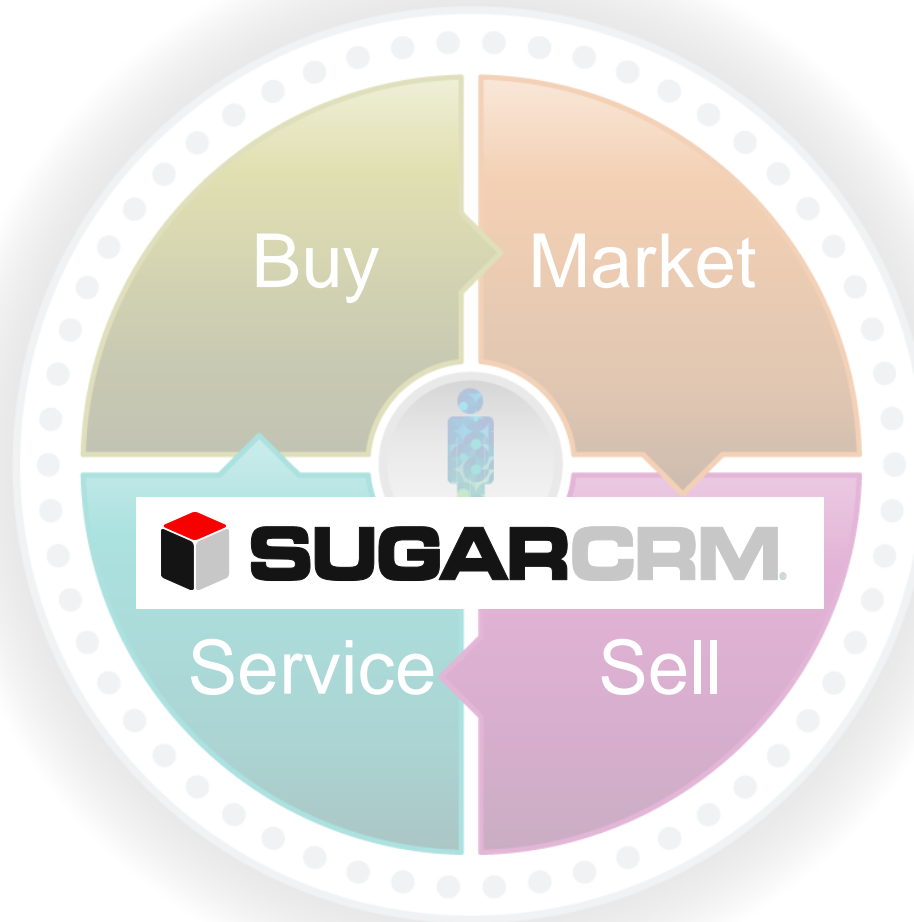
Targeted and personalized marketing across all channels

Service

Anticipate behavior and deliver flawless customer service

Sell

Seamless cross-channel customer experience



SugarCRM and IBM Smarter Commerce:

- Extends Smarter Commerce to **customer-facing Individuals** (eg sales and service reps)
- Ensures a seamless customer experience and optimizes across
 - **all channels**: digital and human
 - **across all phases of the customer lifecycle** : market, sell, buy, service



SugarCRM for the **Market** phase



- **Link** customer and prospect information to campaign planning and execution
- **Analyze** customer and prospect information for marketing campaigns using Sugar Analytics Powered by Cognos
- **Ensure marketing linkage to sales** by driving leads / opportunities from IBM Campaign / Leads to Sugar
- Give sales / service people **the right recommendation at the right time**, with IBM Interact surfaced into Sugar
- Link **email marketing / automation to sales / service** with IBM eMessage / Silverpop integration to Sugar

SugarCRM for the **Sell** phase



- Provide an **easy-to-use indispensable tool** for every sales individual
- **Remove marketing / sales boundaries** with tight linkage to sales processes
- **Ensure consistency** between digital marketing and human sales channels with linkages between WebSphere Commerce and Sugar
- Allow sellers to handle ordering tasks **efficiently** by calling up Sterling Order Mgt and CPQ information into Sugar
- Ensure results from sales are **incorporated** into marketing campaigns

SugarCRM for the **Service** phase



- Provide an **easy-to-use indispensable tool** for every service individual
- **Remove marketing / sales / services boundaries** with tight linkage to service processes
- **Ensure consistency** between digital marketing and human sales / service channels with linkages between WebSphere Commerce and Sugar
- Allow call centers to handle ordering tasks **efficiently** by calling up Sterling Order Mgt and CPQ information into Sugar

About SugarCRM

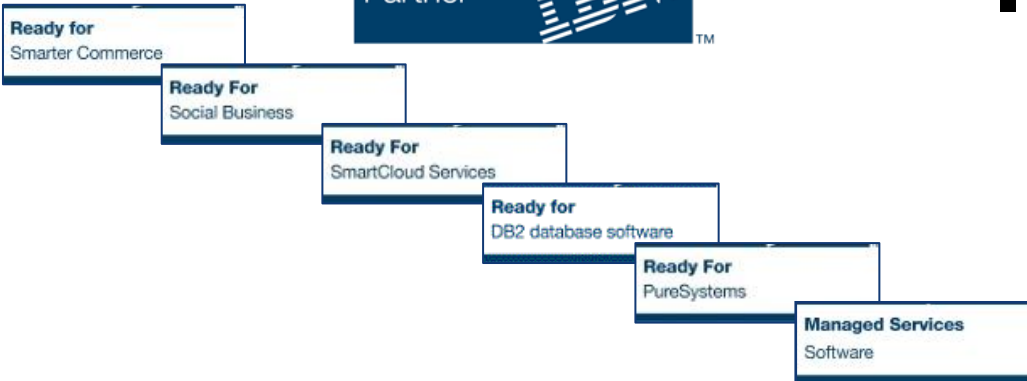
- Largest pure-play provider of CRM software
 - Software-only focus; services via partners
- Most innovative and affordable CRM solution
 - Editions for small business through the largest enterprise (e.g.: IBM)
- Founded in April 2004 with headquarters in Silicon Valley
- One of the largest global CRM providers: 1.4M+ users rely on Sugar in 120 countries and more than 26 languages
- Strategic partners extend breadth of offerings
- Recognized CRM leader by industry analyst firms – Gartner Visionary



IBM and SugarCRM Partnership



SUGARCRM®



- Partnership since 2010
 - Global Strategic Alliance
- Target Markets
 - Insurance, Banking, Financial Services
 - Retail
 - Automotive, Manufacturing & Hi-Tech
 - Shipping & Transportation
 - Government & Health Care
- Joint Initiatives
 - Smarter Commerce
 - Social Business
 - Cognos
 - Intelligent Transport
 - Smart Cloud / SoftLayer
 - PureSystems, DB2, PowerLinux

SugarCRM and IBM Smarter Commerce

- Provides a **seamless customer experience** optimized across
 - all channels: digital and human
 - across all phases of the customer lifecycle : market, sell, buy, service
- **Marketing professionals** can link customer and prospect information to campaign planning and execution
- **Sales professionals** are in sync with digital and corporate marketing initiatives
- **Service professionals such as call center agents** see and reinforce previous marketing and sales interactions and can refer to order and CPQ information

First major CRM solution to meet IBM's "Ready for Smarter Commerce" criteria!



DiGi Telecommunications



The Need:

- Improve customer acquisition and satisfaction
- Improve sales efficiency
- Closed loop process between marketing to sales
- Needed data to reside in-country

The Solution:

- Sugar Professional with IBM Campaign, implemented by iZeno

The Benefits:

- Reduces manual data entry and allows sales people to spend more time selling
- Sales people can now ensure delivery of equipment and services to end customers, on time
- Consistency between marketing and sales

“With the help of iZeno, Sugar Professional with IBM Campaign has removed obstacles and unlocked the potential of our sales teams.”

*- Christian Schutt,
Head of Operations,
Digi*

Implementation partner:



Global consumer electronics accessory company uses Silverpop and SugarCRM to link email automation to CRM

- Company has had over 3000% growth in last three years; needed a CRM solution that could scale with their rapid growth.
- Tightly integrated with Cisco Telephony for simplified customer identification and with order system for single view of the customer
- CSR's use SugarCRM to easily resolve support incidents, issue returns, assist with new orders, deliver product how-tos and flag potential fraud
- Uses Silverpop integrated to SugarCRM link email marketing automation to CRM

IBM's adoption of Sugar for 45,000+ sales people

The OVUM logo consists of a red square with the word "OVUM" in white, sans-serif, uppercase letters.

IBM's Adoption of Sugar: A Lesson in Global Implementation

IBM's agile, collaborative, user-centered approach wins over 45,000 sales people

Reference Code: IT020-000022
Publication Date: 24 Apr 2014
Author: Jeremy Cox

- **2 million opportunities** present in the system at roll-out
- global roll-out... **completed over a six-week period**
- **308,000 meetings** recorded in the system, with an average of 15,000 new ones each week
- **2,500 files** shared per week between individuals within sales teams
- **120,000 tagged items**, growing at over 10,000 per week

We put the “i” in
CRM



 SUGARCRM

Retail Example



Our Retail Organization

Aurora – a fashion and lifestyle company with web and brick-and-mortar stores



Multiple Aurora individuals



Regina – a call center agent



David – also a call center agent



Clint – a retail store associate



Our Customer

Profile

- Lives and works in Singapore
- Busy and always on-the-go
- Shops at several luxury retailers
- Prefers to leverage digital channels
- Has previously purchased products at Aurora



Anna
Busy Executive

Anna is browsing Aurora online storefront powered by WebSphere Commerce



Personalized welcome messages based on customer profile

Product recommendations that coordinate with shopping cart contents

Personalized experience based on previous purchases

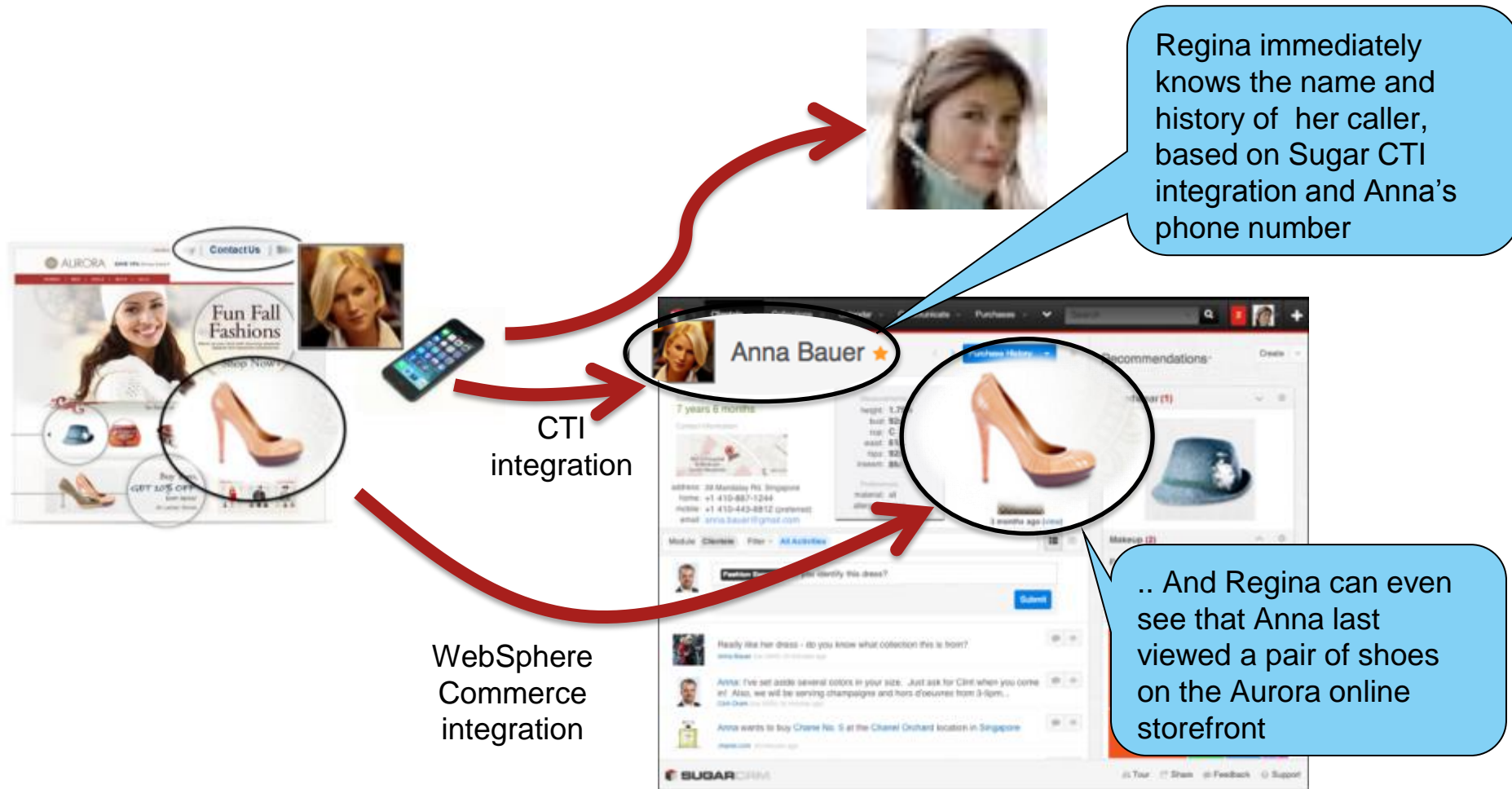
She's interested in a pair of shoes, but has a question - so she places a call to Aurora



The call is handled by Regina Lazlow, Aurora Customer Support Rep using Sugar



The call is handled by Regina Lazlow, Aurora Customer Support Rep using Sugar



Let's take a closer look at Regina's view of Anna in Sugar

The screenshot displays the SugarCRM interface for a user named Regina, viewing the profile of a customer named Anna Bauer. The interface is divided into several sections:

- Header:** Includes navigation tabs (Clientele, Collections, Calendar, Communicate, Purchases), a search bar, and a user profile icon.
- Customer Profile:**
 - Customer For:** 7 years 6 months.
 - Contact Information:** Address: 39 Mandalay Rd. Singapore; Home: +1 410-887-1244; Mobile: +1 410-443-8812 (preferred); Email: anna.bauer@gmail.com.
 - Measurements:** height: 1.75m, bust: 92c, cup: C, waist: 61c, hips: 92c, inseam: 86c.
 - Preferences:** material: all, allergies: none.
 - Last Viewed:** 2 hours ago (web) - Image of a high-heeled shoe.
 - Last Purchase:** 3 months ago (view) - Image of a Chanel shopping bag.
- Recommendations:** A sidebar on the right showing recommendations for Headwear (1), Makeup (2), Fragrance (1), and New! (1). Below this is a "Purchases by Category" section with a treemap visualization showing categories like Skin Care, Fragrance, Couture, Shoes, Belts, Sunglasses, and Makeup.
- Activities:** A list of recent activities and messages from Anna Bauer and Clint Oram, including a request to identify a dress and a purchase inquiry for Chanel No. 5.
- Footer:** Includes the SugarCRM logo and links for Tour, Share, Feedback, and Support.

Context panel – all relevant information about Anna

Clientele Collections Calendar Communicate

Anna Bauer ★ Following

Customer For
7 years 6 months

Contact Information

Pen G Hospital & Medical Centre Moulmein

address: 39 Mandalay Rd. Singapore
home: +1 410-887-1244
mobile: +1 410-443-8812 (preferred)
email: anna.bauer@gmail.com

Measurements

height: 1.75m
bust: 92c
cup: C
waist: 61c
hips: 92c
inseam: 86c

Preferences

material: all
allergies: none

Recommendations

Headwear (1)

Makeup (2)

Fragrance (1)

New! (1)

Purchases by Category

Skin Care, Fragrance, Couture, Shoes, Belts, Sunglasses, Makeup

Really like her dress - do you know what collection this is from?
Anna Bauer (via SMS) 45 minutes ago

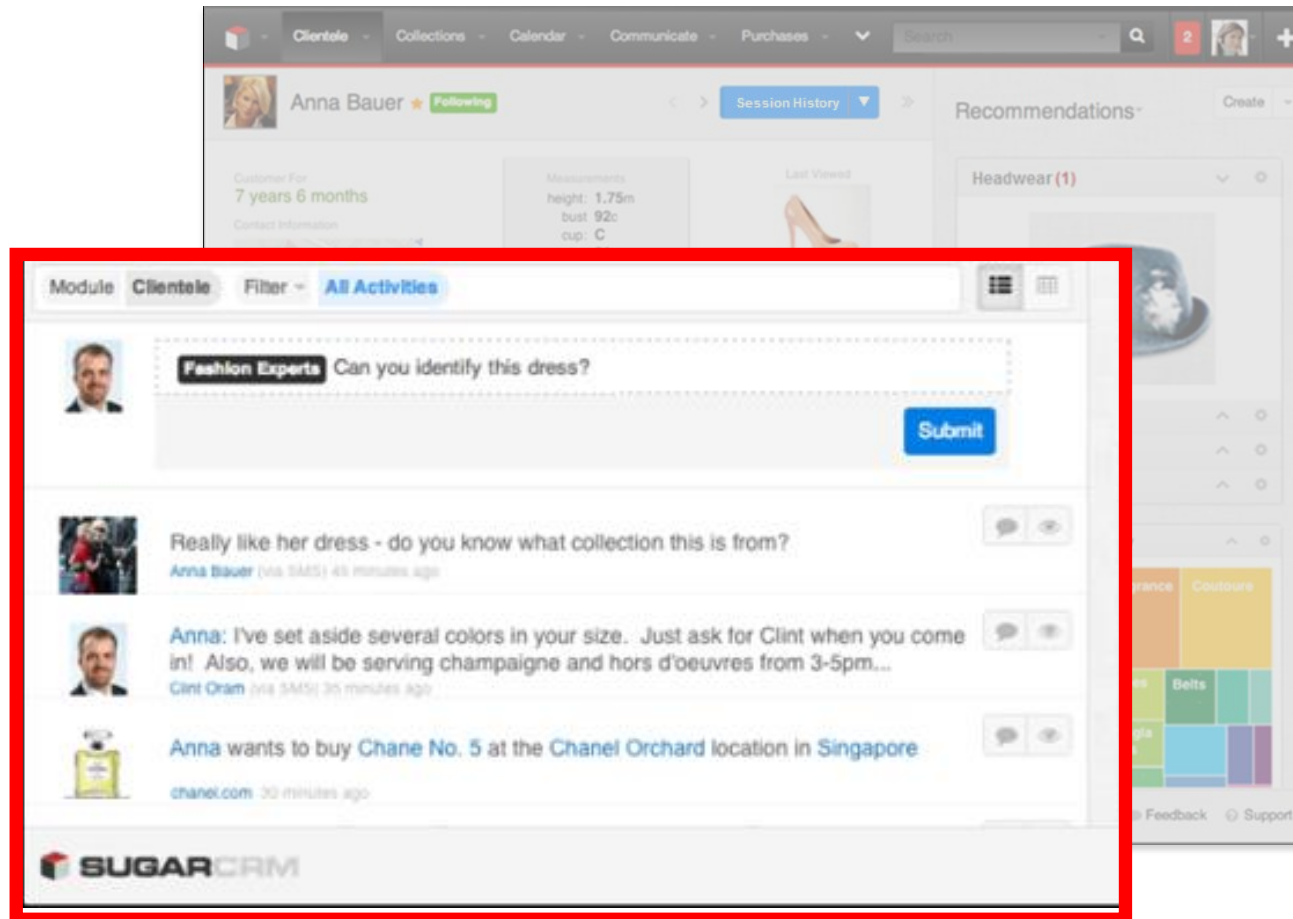
Anna: I've set aside several colors in your size. Just ask for Clint when you come in! Also, we will be serving champagne and hors d'oeuvres from 3-5pm...
Clint Oram (via SMS) 35 minutes ago

Anna wants to buy Chane No. 5 at the Chanel Orchard location in Singapore
chanel.com 30 minutes ago

SUGARCRM

Tour Share Feedback Support

Collaboration panel with activity stream



Intelligence panel

Real-time recommendations

The screenshot displays the SugarCRM Intelligence panel for a customer named Anna Bauer. The main panel shows her profile, including contact information, measurements, and a list of activities. A sidebar on the right, titled 'Recommendations', is highlighted with a red border and contains a list of suggested items: Headwear (1), Makeup (2), Fragrance (1), and New! (1). The 'Headwear (1)' recommendation is expanded, showing a blue hat. The 'Makeup (2)' recommendation is also visible. The bottom of the sidebar features a color-coded grid for 'Makeup' and 'Shoes'.

Customer Profile: Anna Bauer

Customer For: 7 years 6 months

Contact Information:

- address: 39 Mandalay Rd, Singapore
- home: +1 410-887-1244
- mobile: +1 410-443-8812 (preferred)
- email: anna.bauer@gmail.com

Measurements:

- height: 1.75m
- bust: 92c
- cup: C
- waist: 61c
- hips: 92c
- inseam: 86c

Preferences:

- material: all
- allergies: none

Activities:

- Fashion Experts** Can you identify this dress? (Submit)
- Really like her dress - do you know what collection this is from? (Anna Bauer 45 minutes ago)
- Anna: I've set aside several colors in your size. Just ask for Clint when you come in! Also, we will be serving champagne and hors d'oeuvres from 3-5pm... (Clint Oram 35 minutes ago)
- Anna wants to buy Chane No. 5 at the Chanel Orchard location in Singapore (chanel.com 30 minutes ago)

Recommendations:

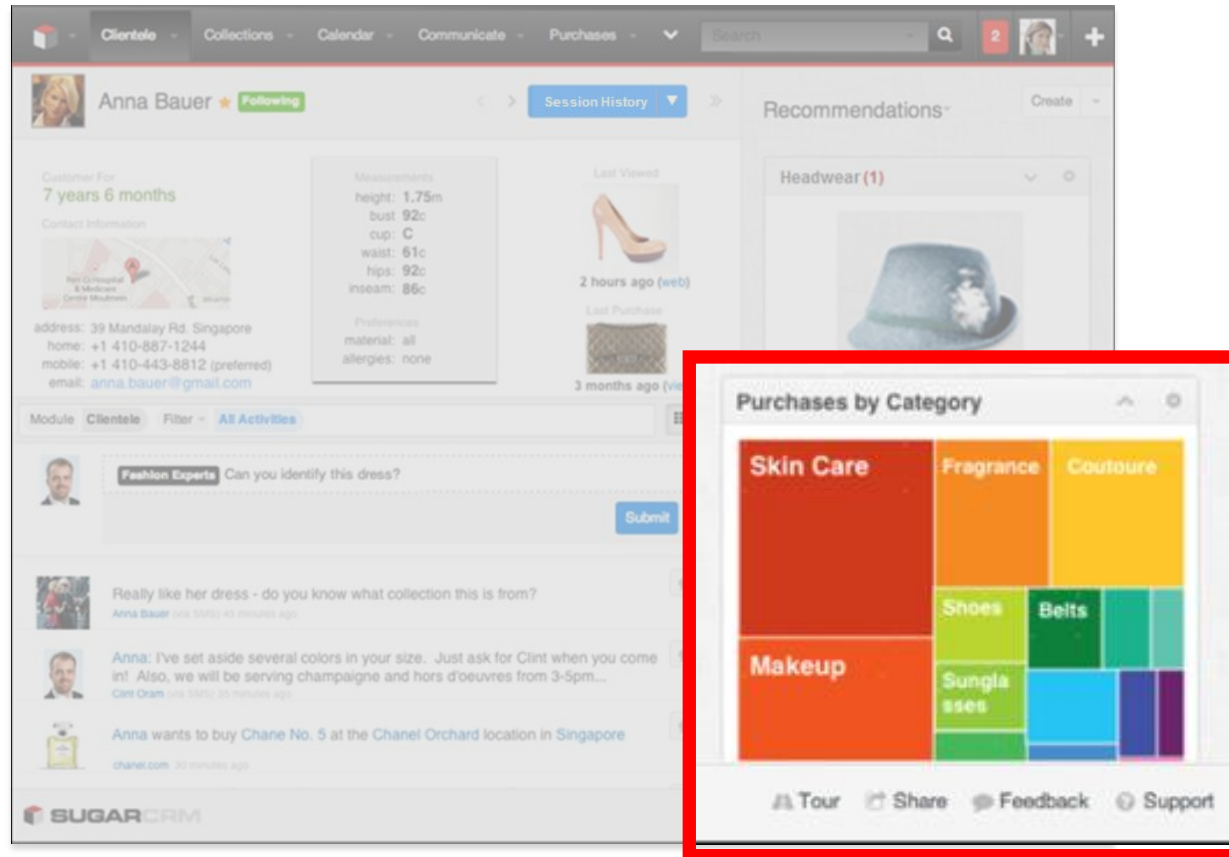
- Headwear (1)** (Blue hat)
- Makeup (2)**
- Fragrance (1)**
- New! (1)**

Sidebar Grid:

- Makeup
- Shoes
- Belts
- Sunglasses

Intelligence panel

Embedded Sugar Analytics Powered by Cognos



Regina can also invoke a Tealeaf session history to replay Anna's web experience

The image displays the IBM Tealeaf CX interface. At the top, a navigation bar includes 'Clientele', 'Collections', 'Calendar', and 'Communications'. Below this, a profile for 'Anna Bauer' is shown, including her contact information and measurements. A red box highlights a 'Session History' panel, which lists 'Last Viewed' (a high-heeled shoe, 2 hours ago) and 'Last Purchase' (a hat, 3 months ago). Below the profile, a 'Session List' table is visible, showing five sessions. A red box highlights the 'Replay Session' button, which includes 'RTV', 'Browser', and 'Cancel' options. The table columns are 'Session Time', 'Duration', 'Login ID', and 'Events'. The first session is on 01/03/2012 at 08:01:32, with a duration of 00:04:23 and login ID 'annabauer@gmail.com'. The last session is on 08/27/2012 at 15:54:39, with a duration of 00:11:32 and login ID 'annabauer@gmail.com'. The page footer indicates 'Page 1 of 1 (1 items)'.

Session History

Last Viewed

2 hours ago (web)

Last Purchase

3 months ago (view)

IBM Tealeaf CX

Dashboards Active Search Analyze Configure Tealeaf Search Online Help Admin

TEALEAF USER: Logout

Search > Session List

Displaying 5 of 5 matching sessions.

Download All

Session List Template: <Default>

Drag Column Headers Here To Group

	Session Time	Duration	Login ID	Events
01/03/2012 08:01:32	00:04:23	annabauer@gmail.com	1 2 3	
12/15/2012 09:13:45	00:07:01	annabauer@gmail.com	1	
11/24/2012 18:17:23	00:06:43	annabauer@gmail.com	1	
09/04/2012 08:12:51	00:09:15	annabauer@gmail.com	1 3 5 6	
08/27/2012 15:54:39	00:11:32	annabauer@gmail.com	1	

Replay Session

RTV Browser Cancel

Page 1 of 1 (1 items)

Based on this, Regina is able to answer Anna's question about the shoes



Clientele - Collections - Calendar - Communicate - Purchases - Search

Anna Bauer ★ Following Session History

Measurements
height: 1.75m
bust: 92c
cup: C
waist: 61c
hips: 92c
inseam: 86c

Preferences
material: all
allergies: none

Last Viewed
2 hours ago (web)

Last Purchase
3 months ago (view)

Product information: premium leather soles

Headwear (1)

Makeup (2)

Fragrance (1)

New! (1)

Purchases by Category

Skin Care	Fragrance	Couture
Shoes	Belts	
Makeup	Sunglasses	

Chat History

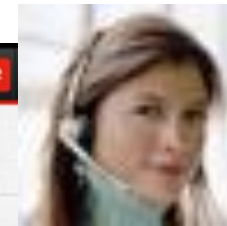
Really like her dress - do you know what collection this is from?
Anna Bauer (via SMS) 43 minutes ago

Anna: I've set aside several colors in your size. Just ask for Clint when you come in! Also, we will be serving champagne and hors d'oeuvres from 3-5pm...
Clint Oram (via SMS) 35 minutes ago

Anna wants to buy Chane No. 5 at the Chanel Orchard location in Singapore
chanel.com 30 minutes ago

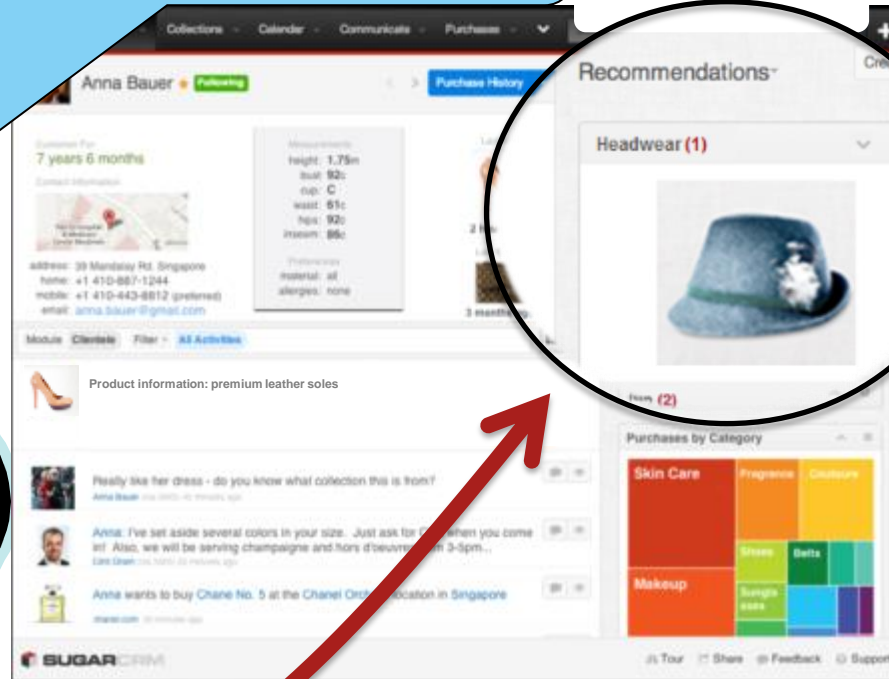
SUGARCRM

Tour Share Feedback Support



Regina also makes a real-time recommendation to Anna, provided by IBM Interact and presented in Sugar

The recommendation is stronger since Anna remembers seeing that offer from the Aurora online storefront



WebSphere
Commerce
integration

Anna decides to buy the shoes and the hat. Regina opens up an order screen in Sugar.



The screenshot shows the SugarCRM interface. At the top, there's a navigation bar with tabs: Clients, Collections, Calendar, Communicate, and Purchases. Below this is the client profile for Anna Bauer, including her photo, name, and a 'Following' status. The profile details include her age (7 years 6 months), contact information (address: 39 Mandalay Rd, Singapore; phone: +1 410-887-1244; mobile: +1 410-443-8812; email: anna.bauer@gmail.com), measurements (height: 1.75m, bust: 92c, cup: C, waist: 61c, hips: 92c, inseam: 86c), and preferences (material: all, allergies: none). There are also sections for 'Last viewed' (a high-heeled shoe) and 'Last purchase' (a hat). To the right, there's a 'Recommendations' section with categories like Headwear (1), Makeup (2), Fragrance (1), and Nail (1). Below that is a 'Purchases by Category' section with a grid of colored squares representing different product categories: Skin Care, Fragrance, Makeup, Shoes, Belts, and Bags. At the bottom of the interface, there are links for Tour, Share, Feedback, and Support.

Orders

Order id: ALP2-I4UNI-E40-A

Ship to: Anna Bauer, 38 Mandalay Road, Singapore

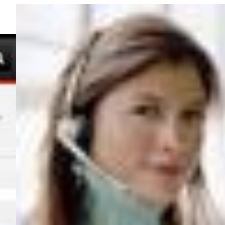
Ship date: 05/07/2014

Product:

Quantity:

Size:

Available:



Integration to Sterling Order Management allows Regina to confirm inventory and place the order

After a few days, Anna decides she'd like the hat in a different color. She calls Aurora to initiate a return.



This time the call is routed to a different agent, Dave – but he sees Anna's past interactions with Regina, and can still deliver consistent service to Anna through SugarCRM

Returns

Return authorization: RMA-ALP2-I4UNI-E40-A

Customer: Anna Bauer, 38 Mandalay Road, Singapore

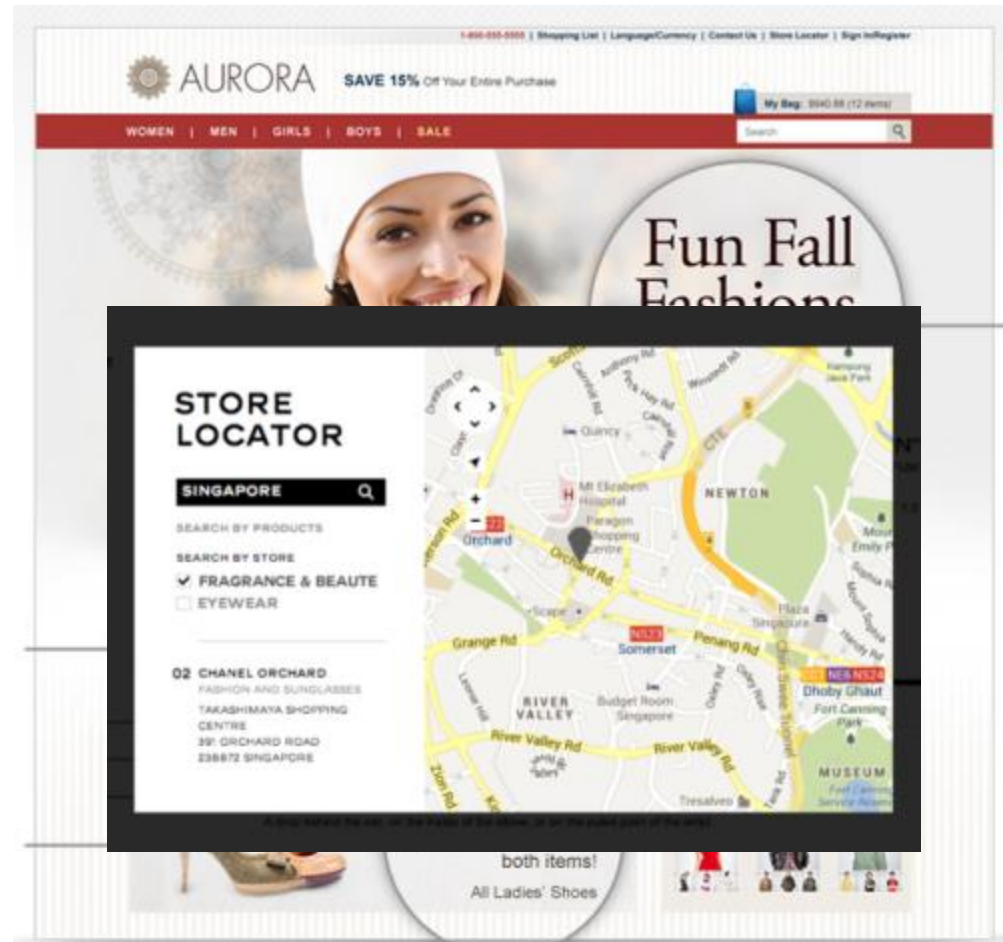
Return date: 05/14/2014

Reason:

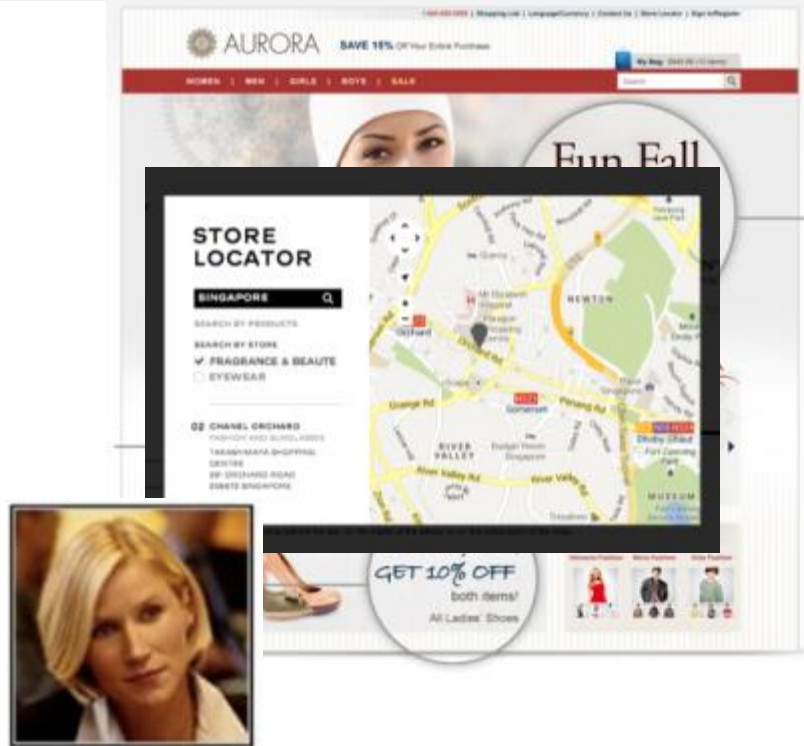
Dave initiates a return authorization through Sugar



Anna decides she'd rather go into a store to try the hat on in person



Behavior Driven Notification



Anna's Activity Triggers a Notification To Clint in the retail store

Web Marketing Automation Integration



Multi-Channel Communication



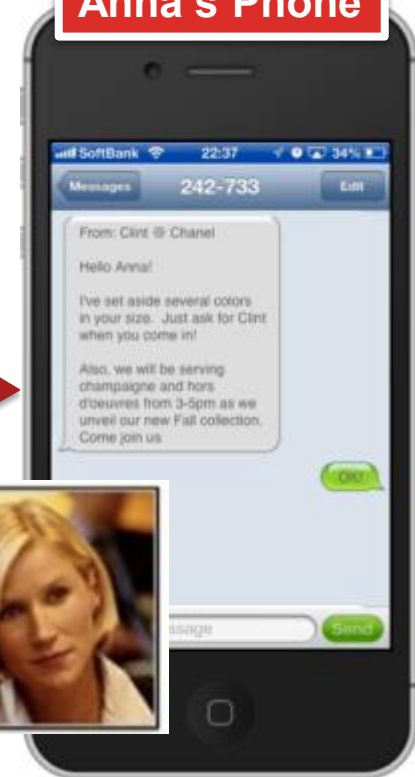
Clint sends Anna a message, offering in-store assistance



Sugar

SMS Gateway Integration

Anna's Phone



Anna lets him know when she'll arrive



Like Regina and Dave, Clint also has an up-to-date view of Anna and all her interactions

Clint's activity stream for Anna shows that she's returned the grey hat and specified that she'd like a different color

Clint's recommendations for Anna includes that same hat but in purple



Anna has completed a [return](#) of this product. Reason given: "Prefer different color"



Summary

- Sugar enabled Regina in the call center to **immediately identify Anna**
- Sugar integrations to **WebSphere Commerce ensured consistency** between Anna's web activity and her interaction with Regina
- Regina was also able to enter a **Tealeaf replay session** to help resolve issues Anna had on the Aurora website
- Regina was able to present a **real-time offer from IBM Interact**
- Integration with **Sterling Order Management** allowed Regina to check inventory and place an order
- A second call by Anna handled by a different call center agent, David, was **consistent** with Anna's other interactions and allowed David to **efficiently handle a return**
- Lastly, Anna's customer experience extended to **an in-person interaction** with a store associate, Clint, also enabled with Sugar

IBM and SugarCRM – providing exceptional customer experiences across digital and human channels, and across all phases of the customer lifecycle

SugarCRM and IBM Smarter Commerce:

- Extends Smarter Commerce to **customer-facing Individuals** (eg sales and service reps)
- Ensures a seamless customer experience and optimizes across
 - **all channels**: digital and human
 - **across all phases of the customer lifecycle** : market, sell, buy, service



Learn more

- Go to sugarcrm.com/ibm
- Follow @sugaribm

