IBM Smarter Commerce
and

SUGARCRM

Mobile and social technologies are reshaping business

55% of smartphone users compare prices in stores

34% of smartphone users have scanned a QR Code, 27% have read online reviews

50% increase in online sales via mobile devices over 2011

63% of online adults are less likely to buy via other channels if they experienced a problem on their mobile phones

92% of consumers say they trust earned media, such as word-of-mouth and recommendations

84% of US adults who have conducted a transaction online or through a mobile device report experiencing a problem

Sources: IBM, Forrester, Tealeaf and Emphathica Reports

SUGARCRM.

Leaders are redefining the value chain
around the empowered customer

A supply chain
prepared
for the unpredictable

Marketing targeted to every customer
personally

Service that **knows**
what customers want before they do

Selling that's there for your customers,
wherever they are

across human and digital interaction channels

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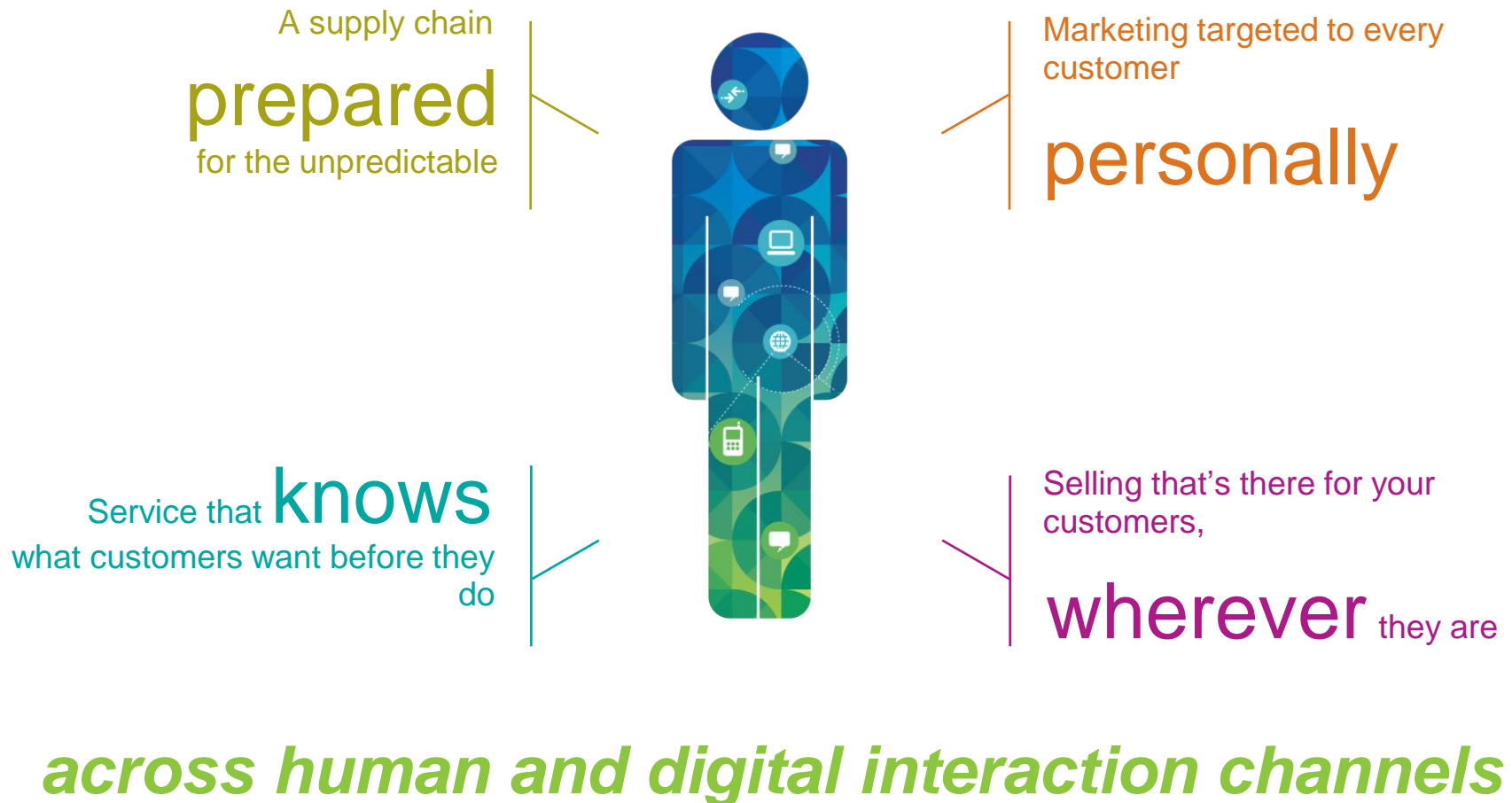
At IBM, we call the path forward Smarter Commerce: *placing the customer at the center of your business*

Buy
Adaptive procurement and optimized supply chain

Service
Anticipate behavior and deliver flawless customer service

Market
Targeted and personalized marketing across all channels

Sell
Seamless cross-channel customer experience

SUGARCRM

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

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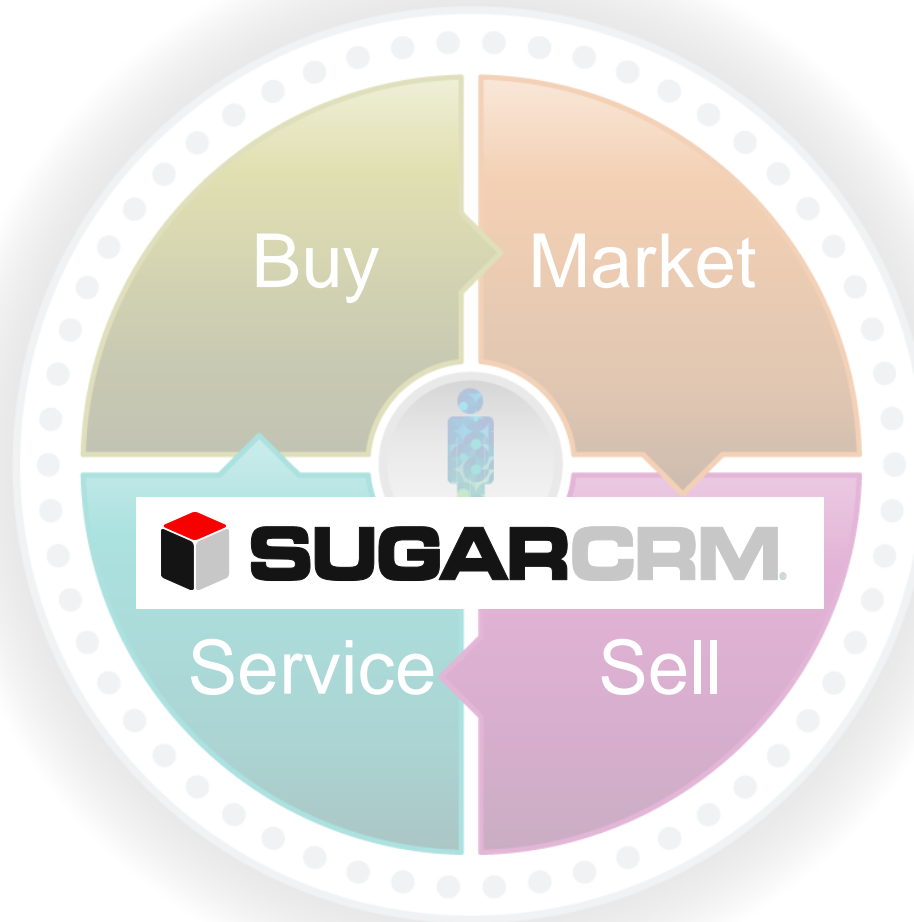
SUGARCRM

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

SUGARCRM.

- 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.

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 / serivce 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

2013 CRM MARKET LEADER

Gartner

FORRESTER

Advanced Business Partner — IBM

SUGARCRM

IBM and SugarCRM Partnership
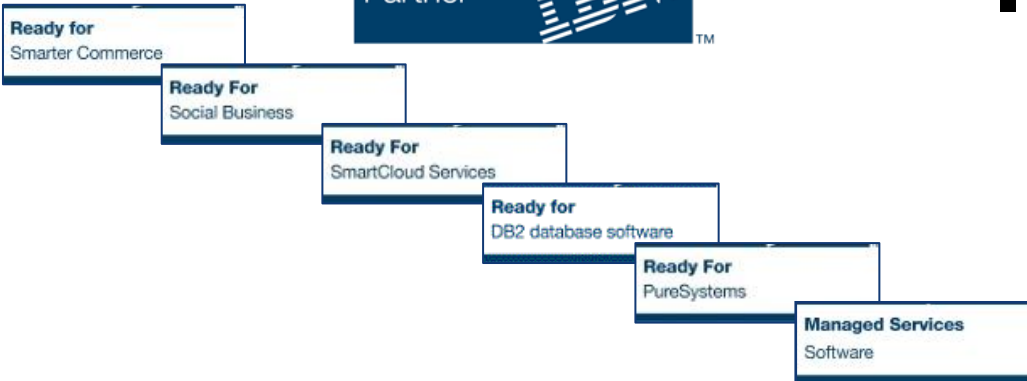
- Partnership since 2010
  - Global Strategic Alliance

- 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

IBM

SUGARCRM.

Advanced Business Partner **IBM** ™

Ready for Smarter Commerce

Ready For Social Business

Ready For SmartCloud Services

Ready for DB2 database software

Ready For PureSystems

Managed Services Software

SUGARCRM.

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!

Advanced Business Partner IBM

Ready for Smarter Commerce

SUGARCRM

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

SUGARCRM

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

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

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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

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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

SUGARCRM

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

Regina immediately knows the name and history of her caller, based on Sugar CTI integration and Anna's phone number

CTI integration

SUGARCRM

The call is handled by Regina Lazlow, Aurora Customer Support Rep using Sugar
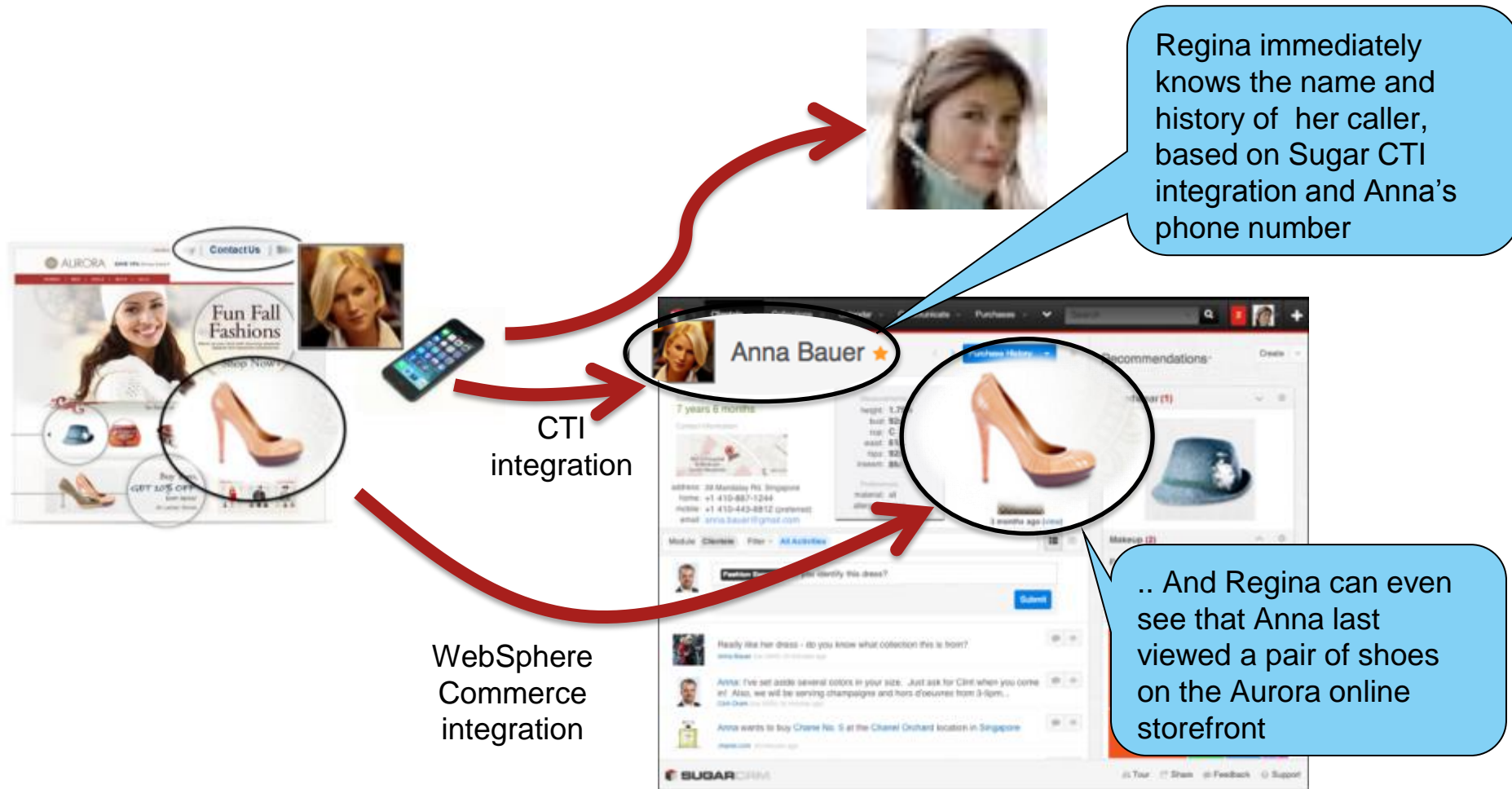
Let's take a closer look at Regina's view of Anna in Sugar

SUGARCRM.

Context panel – all relevant information about Anna

SUGARCRM

Collaboration panel with activity stream

Intelligence panel
Real-time recommendations

SUGARCRM

Intelligence panel
Embedded Sugar Analytics Powered by Cognos

SUGARCRM

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

Based on this, Regina is able to answer Anna's question about the shoes
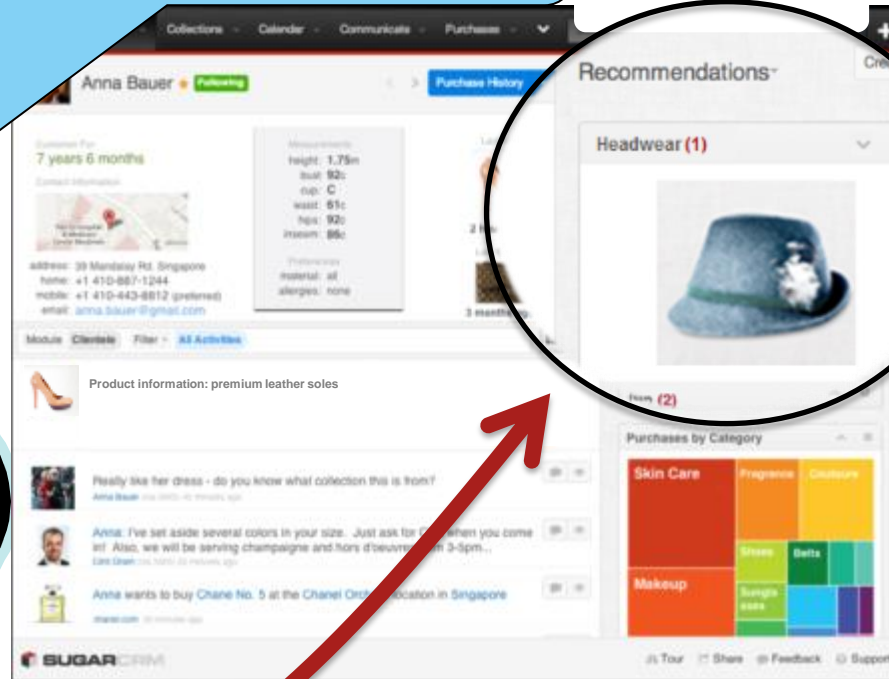
Regina also makes a real-time recommendation to Anna, provided by IBM Interact and presented in Sugar

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

WebSphere Commerce integration

SUGARCRM

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

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

Dave initiates a return authorization through Sugar

Returns   X

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

Customer: Anna Bauer, 38 Mandalay Road, Singapore

Return date: 05/14/2014

Reason: Wrong color ▼

Done   Cancel

SUGARCRM

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

SUGARCRM.
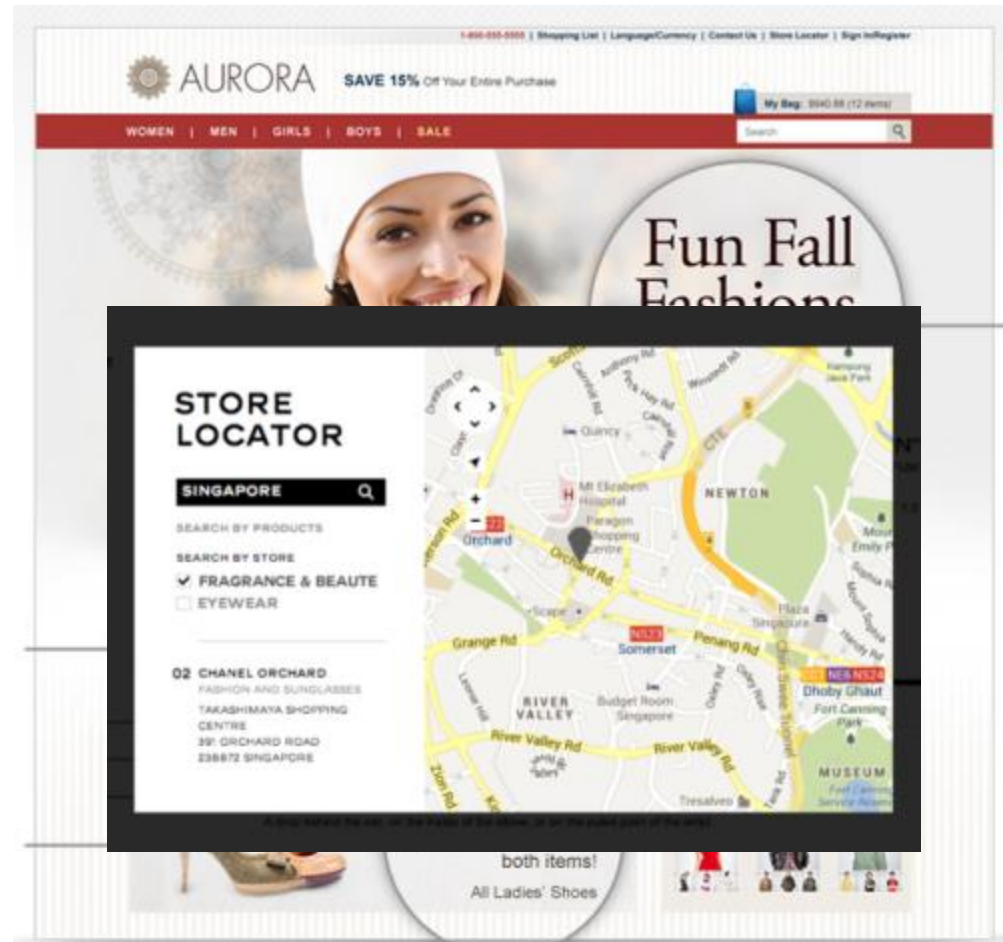
Behavior Driven Notification
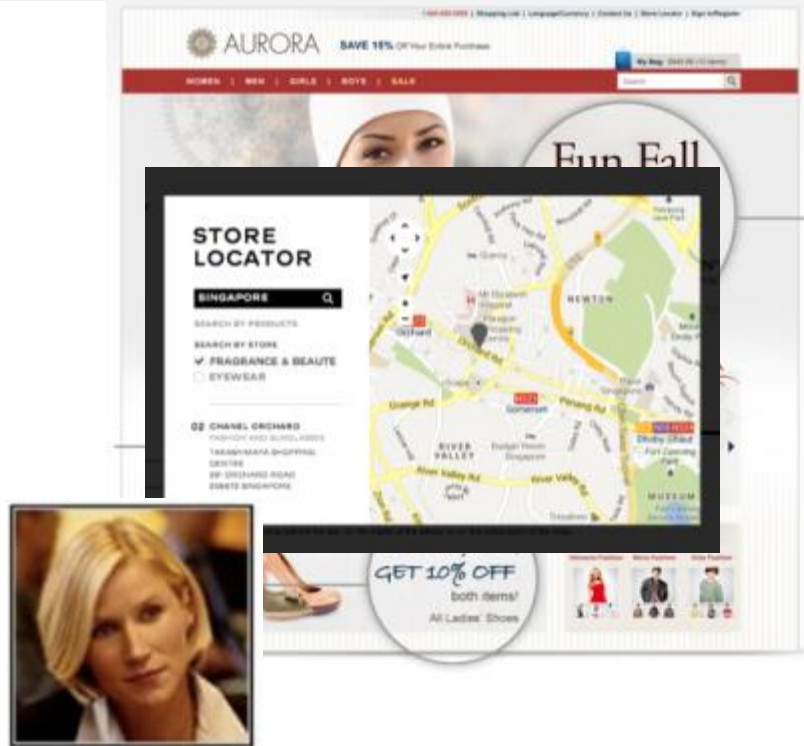
Anna's Activity Triggers a Notification To Clint in the retail store

Web Marketing Automation Integration

Sugar

SUGARCRM

Multi-Channel Communication

Clint sends Anna a message, offering in-store assistance

Anna's Phone

Sugar

SMS Gateway Integration

From: Clint @ Chanel

Hello Anna!

I've set aside several colors in your size. Just ask for Clint when you come in!

Also, we will be serving champaigne and hors d'oeuvres from 3-5pm as we unveil our new Fall collection. Come join us

OK!
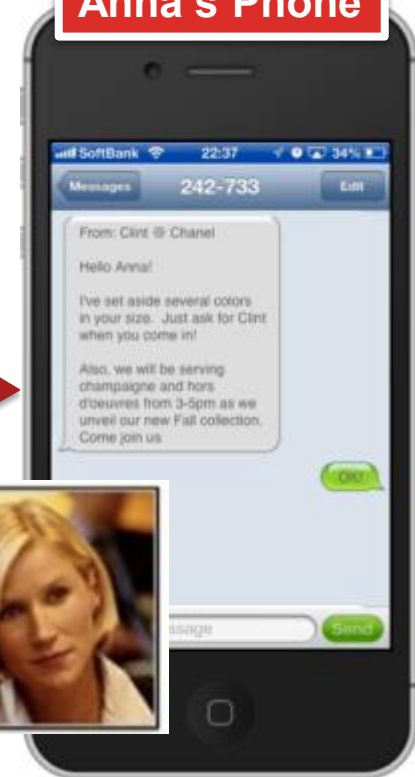
Anna lets him know when she'll arrive

SUGARCRM.

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

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

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Learn more

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

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