

# Get Social

The Social Business Roadshow

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Hosted By:



**BRIXCRM™**

# Introduction & Welcome

Jan-Maarten Plomp, BrixCRM



# Social Business Roadshow – Amsterdam

- Welcome

- Presented by

- IBM Mid Market Team
- SugarCRM
- BrixCRM

- Speakers

- Ronald Velten, IBM
- Larry Augustin, CEO, SugarCRM
- Tom Schuster, GM & VP EMEA, SugarCRM
- Rogier Oonk, Welland
- Erik Vos, RealConnections
- Andrey Andreev, Technical Sales Engineer, SugarCRM



# Overview

10:30 – 10:40	Introduction & Welcome	Jan-Maarten Plomp, BrixCRM
10:40 – 11:05	From Social Media to Social	Ronald Velten, IBM
11:05 – 11:30	The New Rules of Social CRM	Larry Augustin, SugarCRM
11:30 – 11:50	How Do You Get Started	Tom Schuster, SugarCRM
11:50 – 12:15	Best Practices for a Social Business	Ronald Velten, IBM
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14:15 – 14:30	Q & A	All
14:30	Conclusion	

# SugarCRM



Leader Position in CRM for  
Midmarket - *June 2010*

- **Business**
  - Leading provider of Open Source CRM Software
  - Founded April 2004 in Cupertino, California
  - Europe Head Office in Munich, Germany
  - IBM Global Alliance Partner
- **Market Traction**
  - Award winning products
  - 3<sup>rd</sup> largest global CRM Provider
  - 800,000+ users, 80,000+ organisations
  - 250+ partners on five continents
- **Fastest Growing**
  - 50%+ billings growth 2010 over 2009
  - > 9 Million downloads
  - 2,500+ New customers in 80 countries

# BrixCRM



**BRIXCRM™**

- 15 collegae
- 2005 gestart
- Klantgericht ondernemen
- > 100 klanten, Vanderlande Industries, Politie, Agentschap, TomTom, ect
- Products
  - SugarCRM
  - Jaspersoft BI
  - Liferay Portal

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# ***From Social Media to Social CRM***





# RONALD VELTEN

Director Marketing, Communications & Citizenship  
IBM Benelux



**Follow Me** @ronaldvelten

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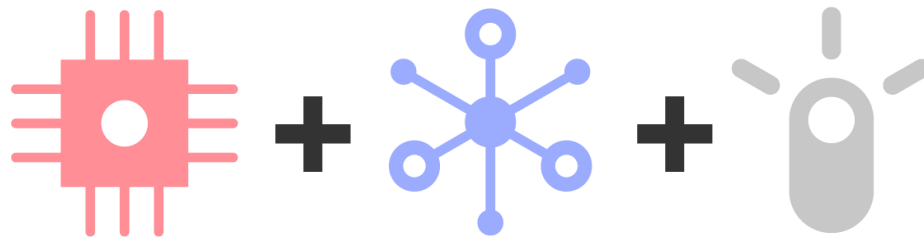
# Your feedback is welcomed

#SugarCRM



@ronaldvelten

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## A list of things that weren't around on 9/11/01

Facebook

Twitter

Tumblr

iPhone

Netbook

iPad

Android Phones

LotusLive

Flipcam

X-box

LinkedIn

Wii

Hyves

Gmail

Wikipedia

Flickr

Foursquare

Spotify

Skype

Delicious

Bit.Ly

LotusLive

SugarCRM

.....

.....

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## A list of things that weren't around on 9/11/01

Facebook	(2004)	X-box	(2001)	Skype	(2003)
Twitter	(2006)	LinkedIn	(2003)	Delicious	(2003)
Tumblr	(2007)	Wii	(2006)	Bit.Ly	
iPhone	(2007)	Hyves	(2004)		
Netbook	(2007)	Gmail	(2004)	LotusLive	(2009)
iPad	(2010)	Wikipedia	(2001)	SugarCRM	(2004)
Android Phones	(2007)	Flickr	(2004)	.....	
LotusLive	(2009)	Foursquare	(2009)	.....	
Flipcam	(2006)	Spotify	(2006)	.....	



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**THE WORLD IS CHANGING – SO SHOULD WE**



**“We don’t have a choice on whether we **DO** social media, the question is how well we **DO** it.”**

- Erik Qualman

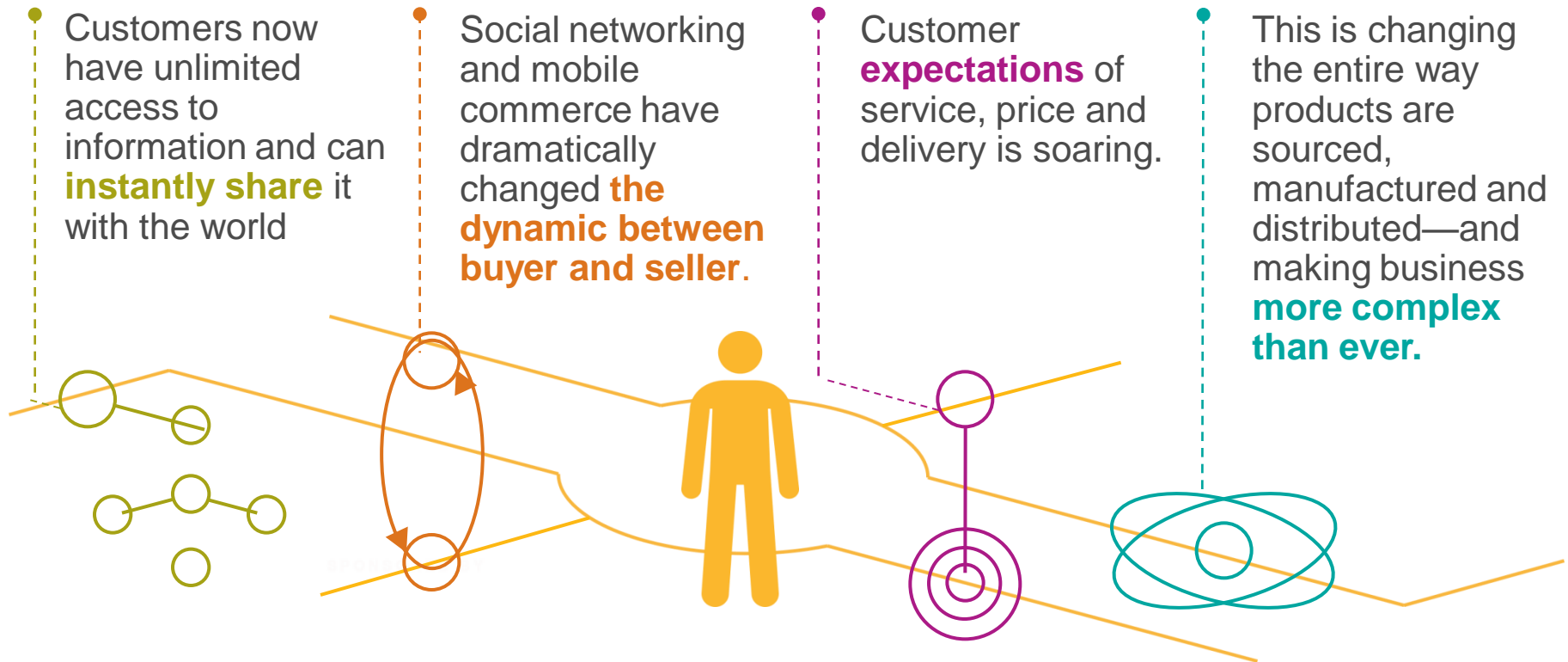
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**“It is not just about doing  
social media for doing it,  
but how you use these emerging  
technologies for social business”**

- Ronald Velten ☺

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# Customers have moved in to a position of power altering the relationship between business and customers





## 1 What Customers Want

What drives customers to interact with businesses via social media?

## 2 Social Media Maturity

What is the current state of businesses' social media initiatives and Social CRM?

## 3 The Big Fears: Risk and ROI

Mitigating risk and determining an ROI - what are businesses doing about these top social media concerns?

# What Customers Want – Social media is all about exchange;

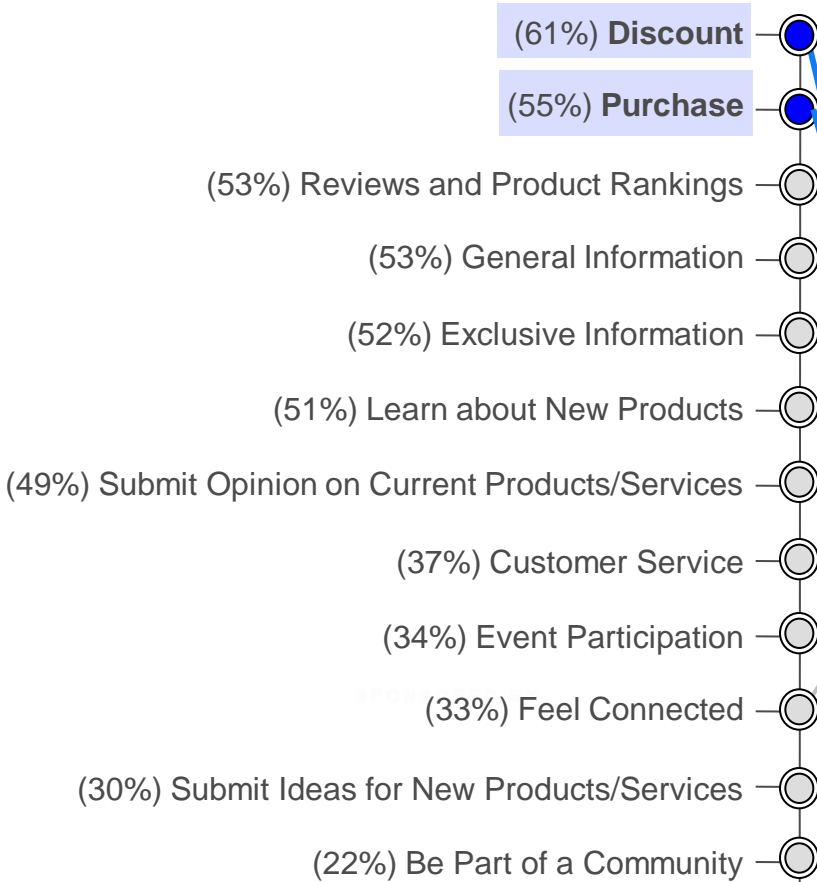
## Findings Highlights

- **Social Media Surge** – Consumers using social media cross all ages and geographies
- **It's Personal** – Most, say, “no thanks” to seeking out businesses via social media
- **Monetizing Social Media** – Perception Gap: Despite what businesses think, most consumers follow them to get tangible value, not to feel connected
- **The Advocacy Paradox** – Perception Gap: Businesses believe engagement breeds advocacy; consumers aren't so sure

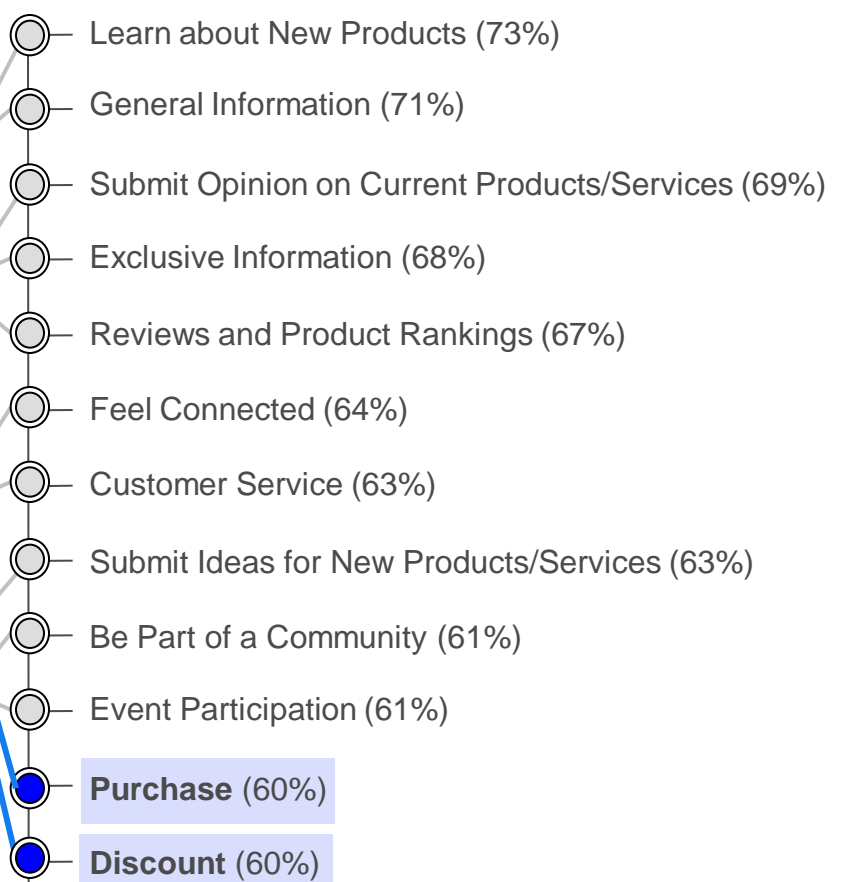


# Perception Gap 1: When consumers interact with brands they expect tangible value in return for their attention, time and personal data

## Consumers' Ranking: The ways they interact with companies via social sites



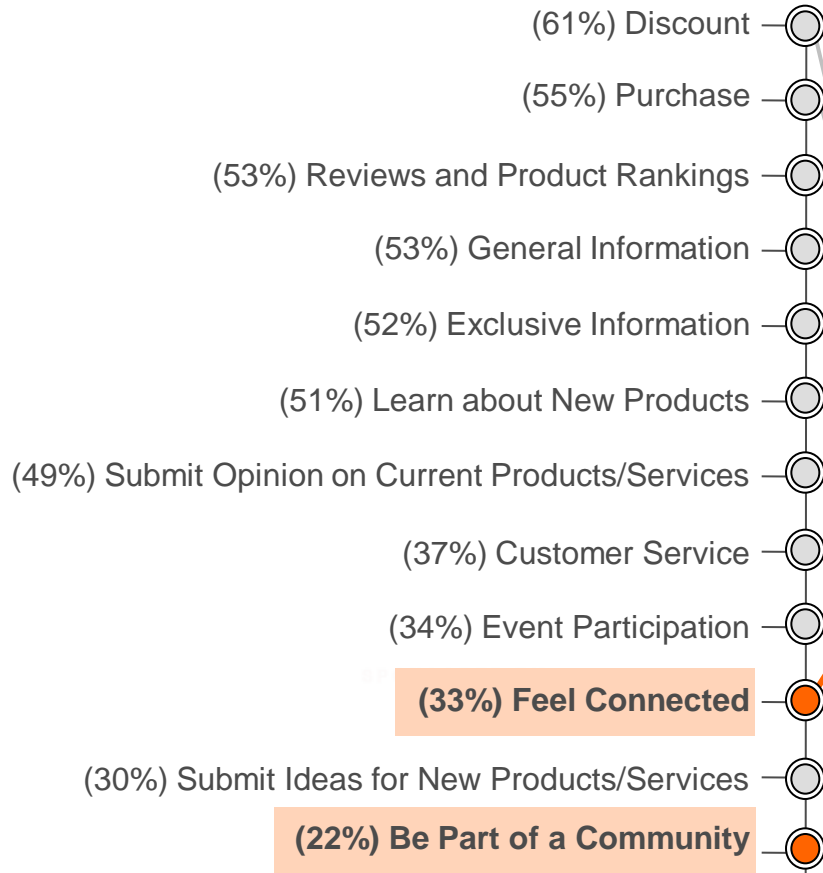
## Businesses' Ranking: Why they think consumers interact them via social sites



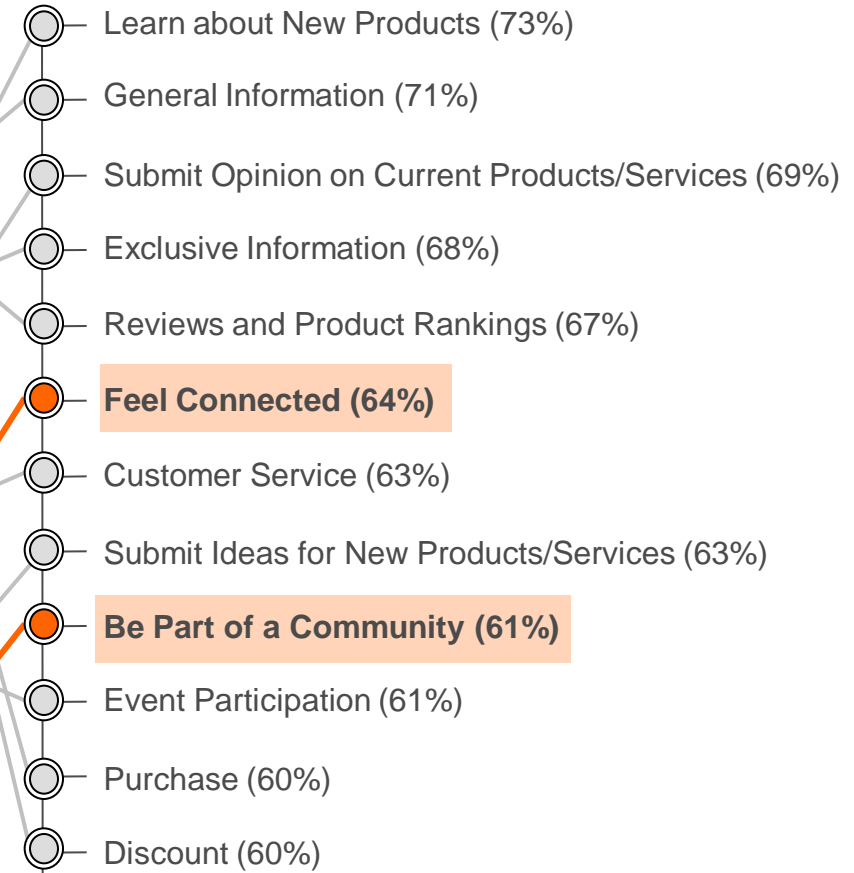
Source: IBM Institute for Business Value Analysis, CRM 2011; sample size Consumer N=1056; Business Learn N=333, General Info N=336, Submit Opinion N=334, Exclusive Info N=333, Reviews/Rankings N=333, Feel Connected N=331, Customer Service N=331, Submit Ideas N=332, Community N=329, Event N=332, Purchase N=334, Discounts N=331

## Perception Gap 2: Businesses are three times more likely than consumers to think consumers interact to feel part of community

### Consumers' Ranking: The reasons they interact with companies via social sites



### Businesses' Ranking: Why they think consumers follow them via social sites



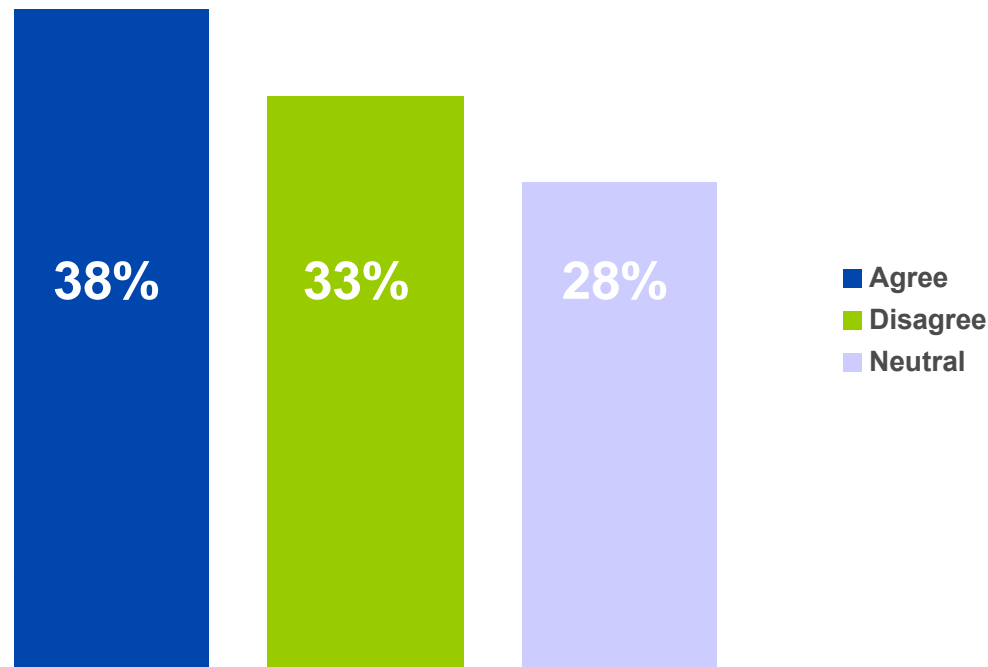
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## Perception Gap 3 – While businesses feel that customer advocacy can be driven through social media, consumers aren't so quick to agree their loyalty will be enhanced through social channels

Agree or Disagree ?  
I feel more loyal toward brands/companies when I interact with them  
via social media or social networking

Consumers are divided on how much influence their social media interactions with a company will have on their loyalty to that business.

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Source: IBM Institute for Business Value Analysis, CRM 2010,

Sample size N= 981, Numbers do not total to 100%, because of rounding



***Providing social media experiences  
that offer real value add  
to customers  
will be the differentiator***



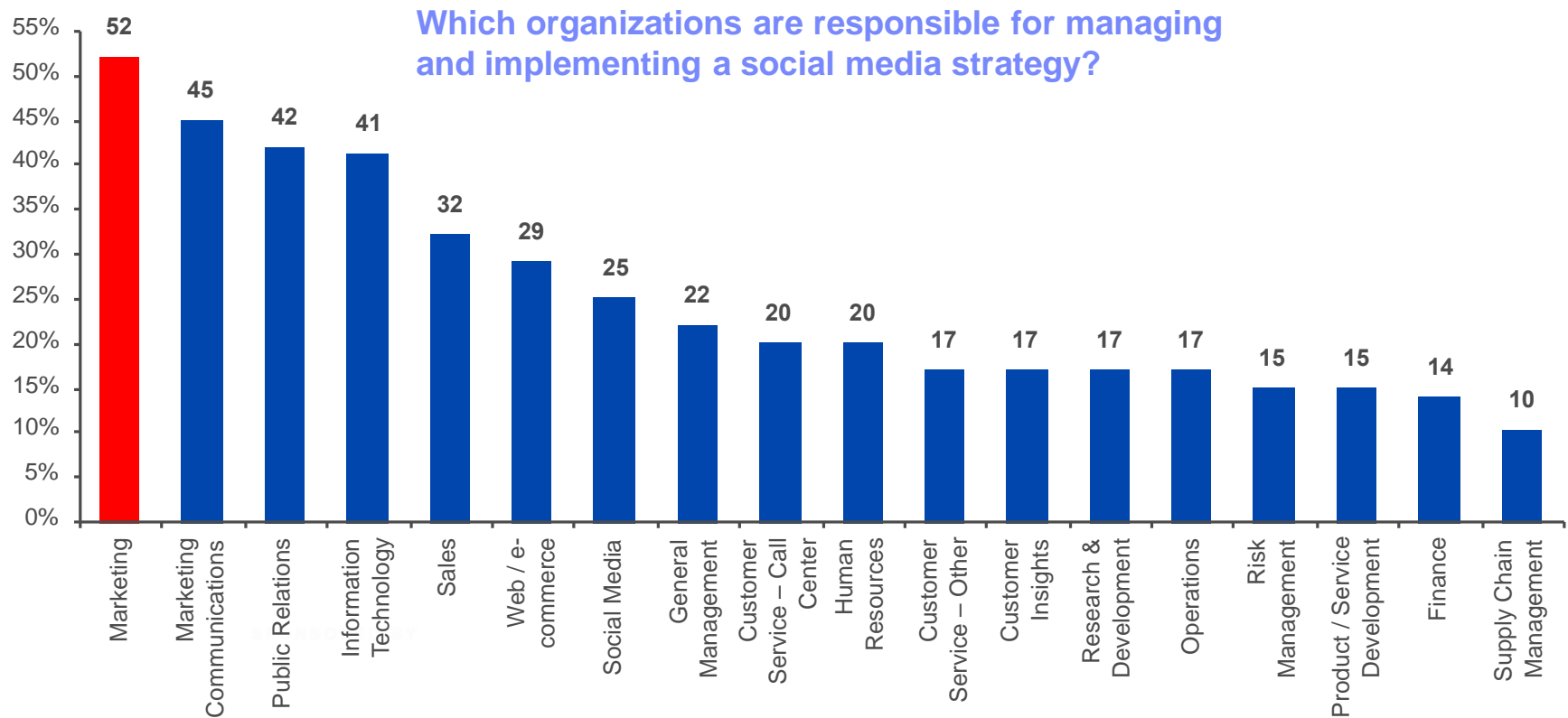
# Social Media Maturity - Companies' making strides establishing social media strategies but less certain about putting them in action

## Findings Highlights

- **Feeling the Pressure** -  
Business is feeling intense pressure to use social media
- **Businesses' Social Media Footprint** – Adoption of social media mirrors consumers use
- **Strategy Snapshot** -  
Companies report having strategies and components of Social CRM, but integration and operation more of a challenge
- **Governance for Innovation** –  
“Centers of Excellence” model allows innovation to flourish, with structures for collaboration and guidelines for engagement



# More than half surveyed said Marketing was responsible for social media strategies, with a broad distribution across other organizations

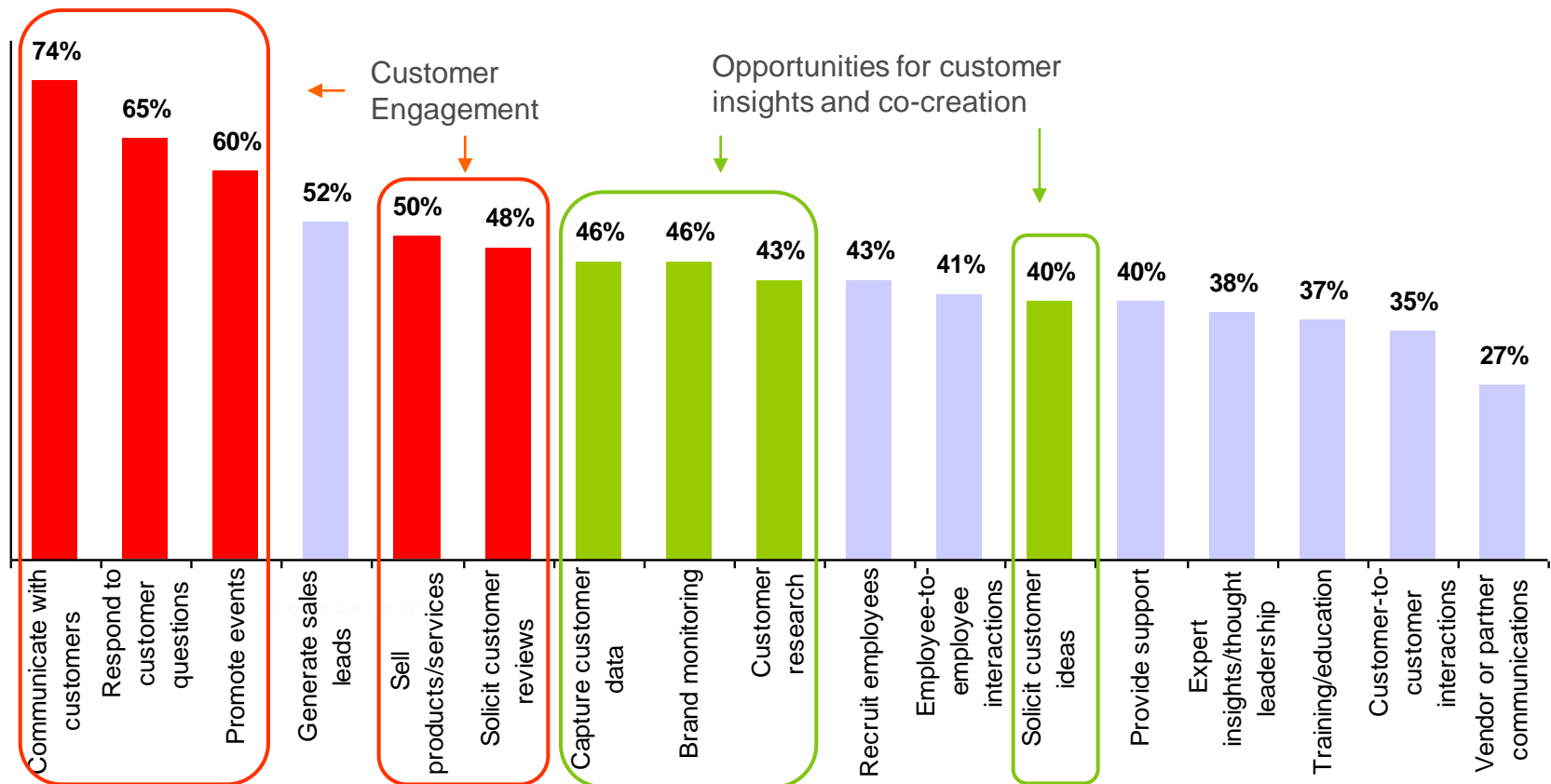


***The prevalence of social media strategies distributed among so many functions indicates how decentralized social media development is.***

Source: IBM Institute for Business Value Analysis, CRM 2010, Sample size: N=351, 'I don't know' – 2% and 'Others' – 1% not shown in chart

# Most of us use social media for some form of customer engagement, yet fewer than half of us use it to monitor their brand, capture customer data or truly interact

## What is your company doing with social media today?



Source: IBM Institute for Business Value Analysis, CRM 2010, Sample size: N=351, 'I don't know' – 9% and 'Others' – 2% not shown in chart

## ***“What's the value of a fan worth?”***

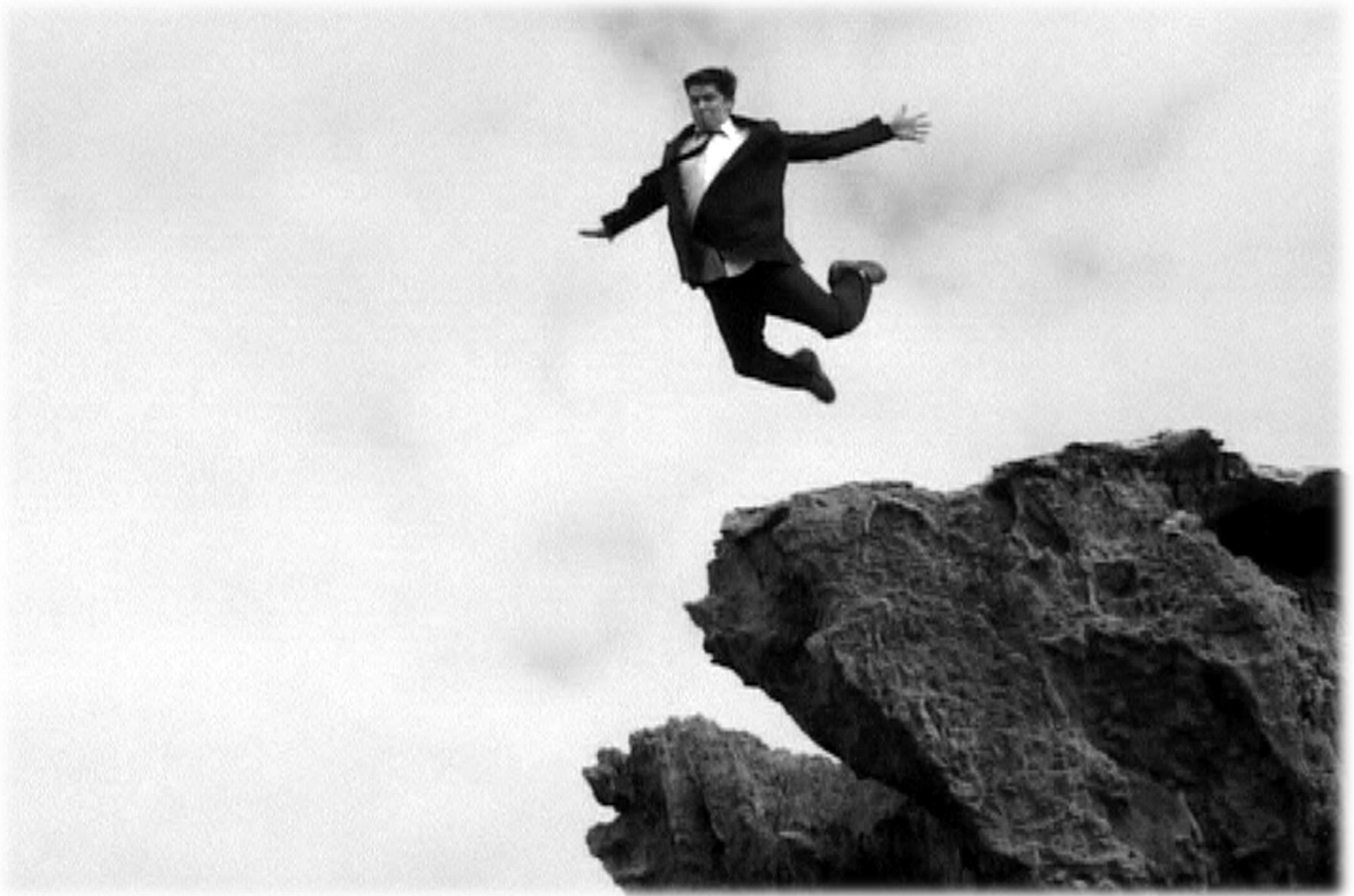
*Trace that back to purchase history, conversion rate, and cost per transaction.*

*Then ask, ‘What’s the cost of deflecting a brand crisis, when we can take a frustrated customer and solve his problem?’*

*Product Manager, Top US Retailer*







# So jump in ....

1. Think social business, not social media
2. Customers want tangible value via social media, so give it to them
3. Move from project-oriented initiatives, to programs and strategies
4. Mitigate risk with focus on analysis, insights, and employee empowerment
5. Think central, act local
6. Start now!











[ibm.com/nl](http://ibm.com/nl)

# Overview

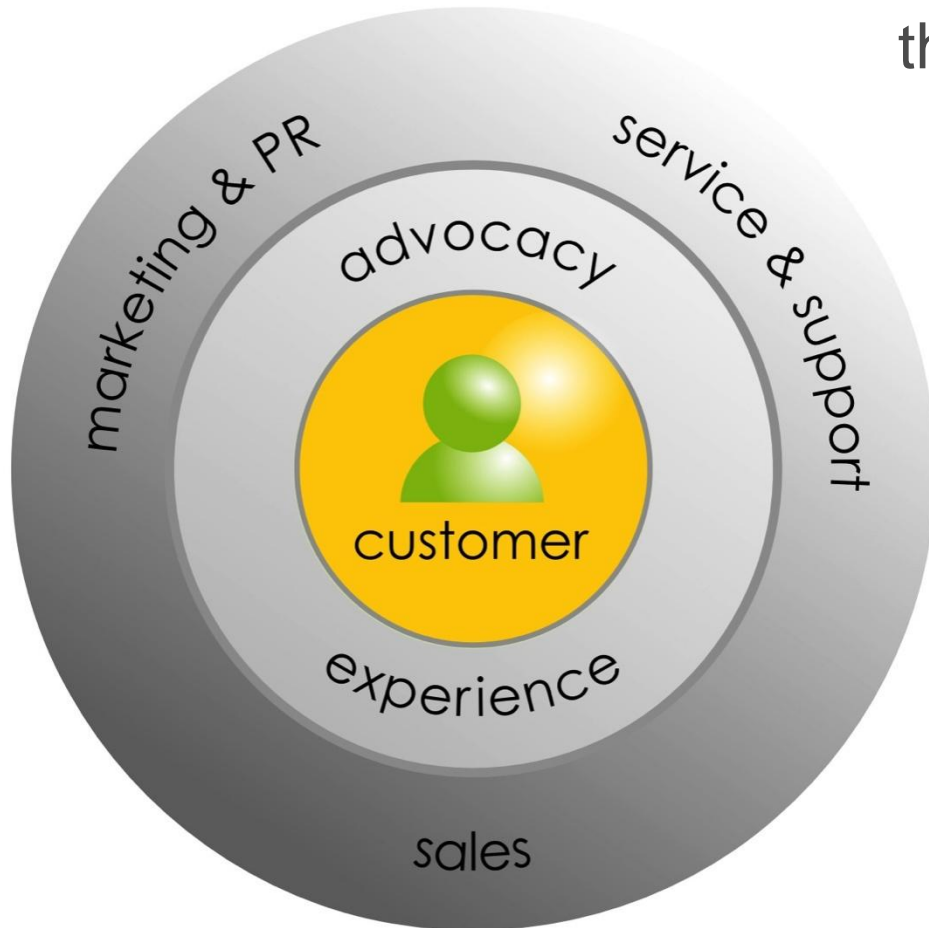
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# ***The New Rules of Social CRM***

**Larry M. Augustin, CEO  
SugarCRM, Inc.**

# Get Social

CRM in the age of **Social** is based on the simple premise that you are able to **Interact** with your customers based on their needs, **not** your rules



**YOU DO THIS  
BY BECOMING  
A SOCIAL  
BUSINESS**

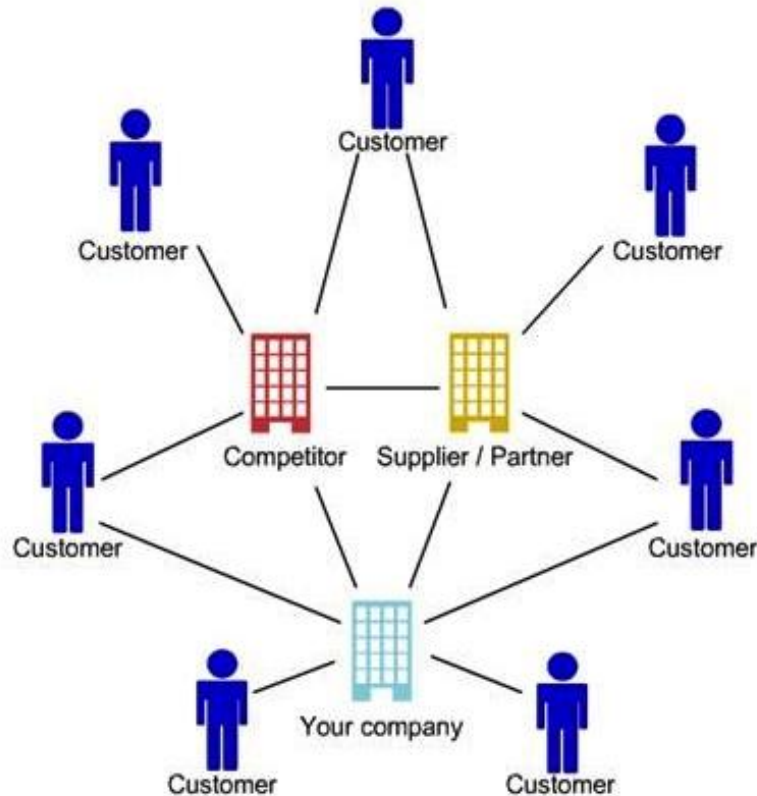
# Change

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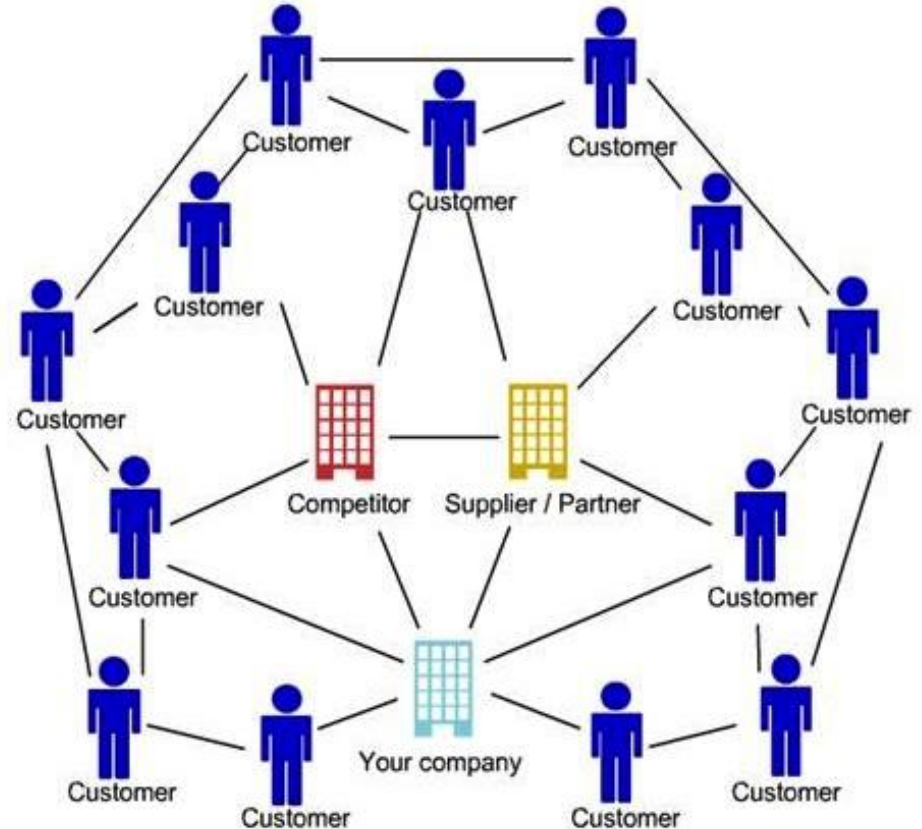


# Change: Customers Believe Customers Not Companies!

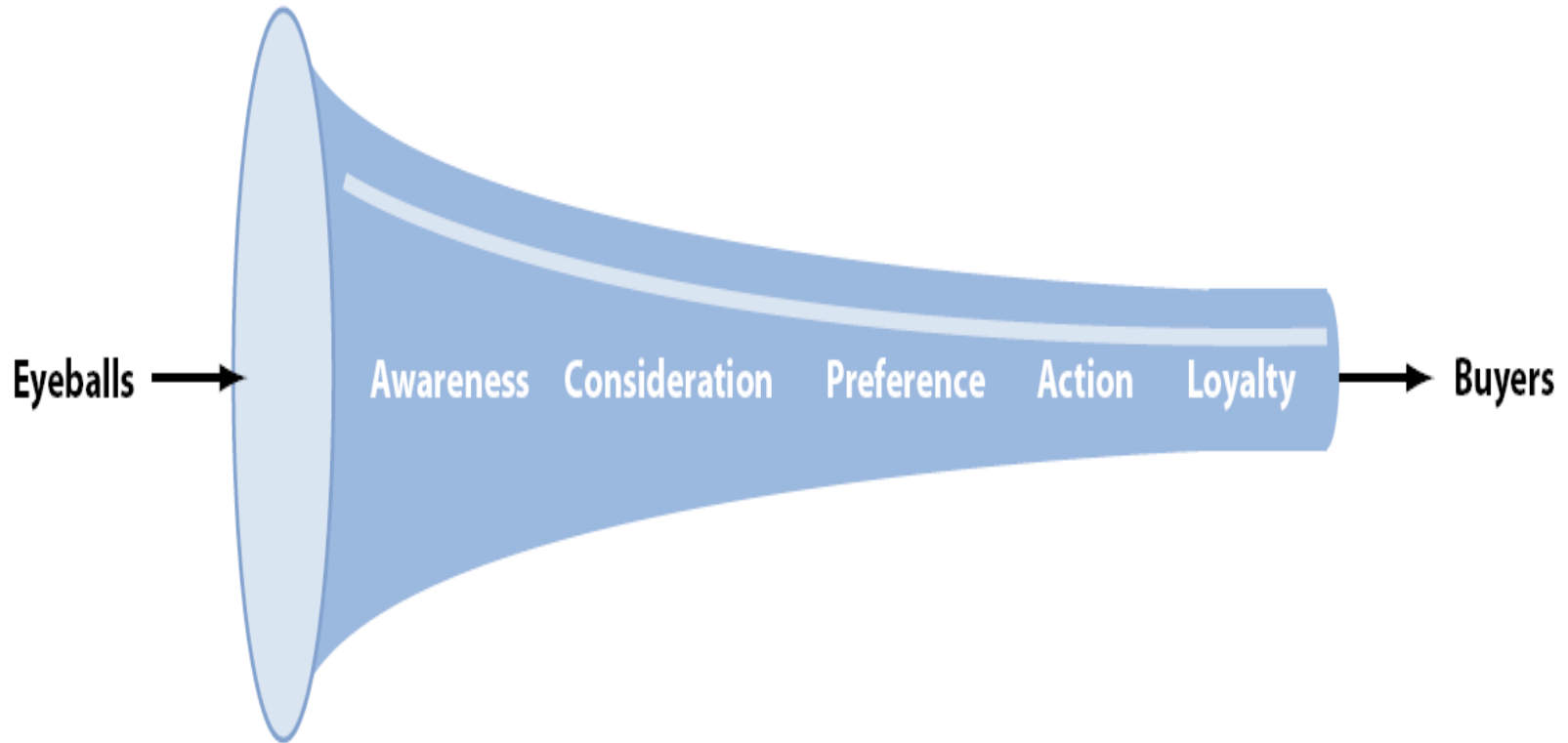
**Old World CRM**



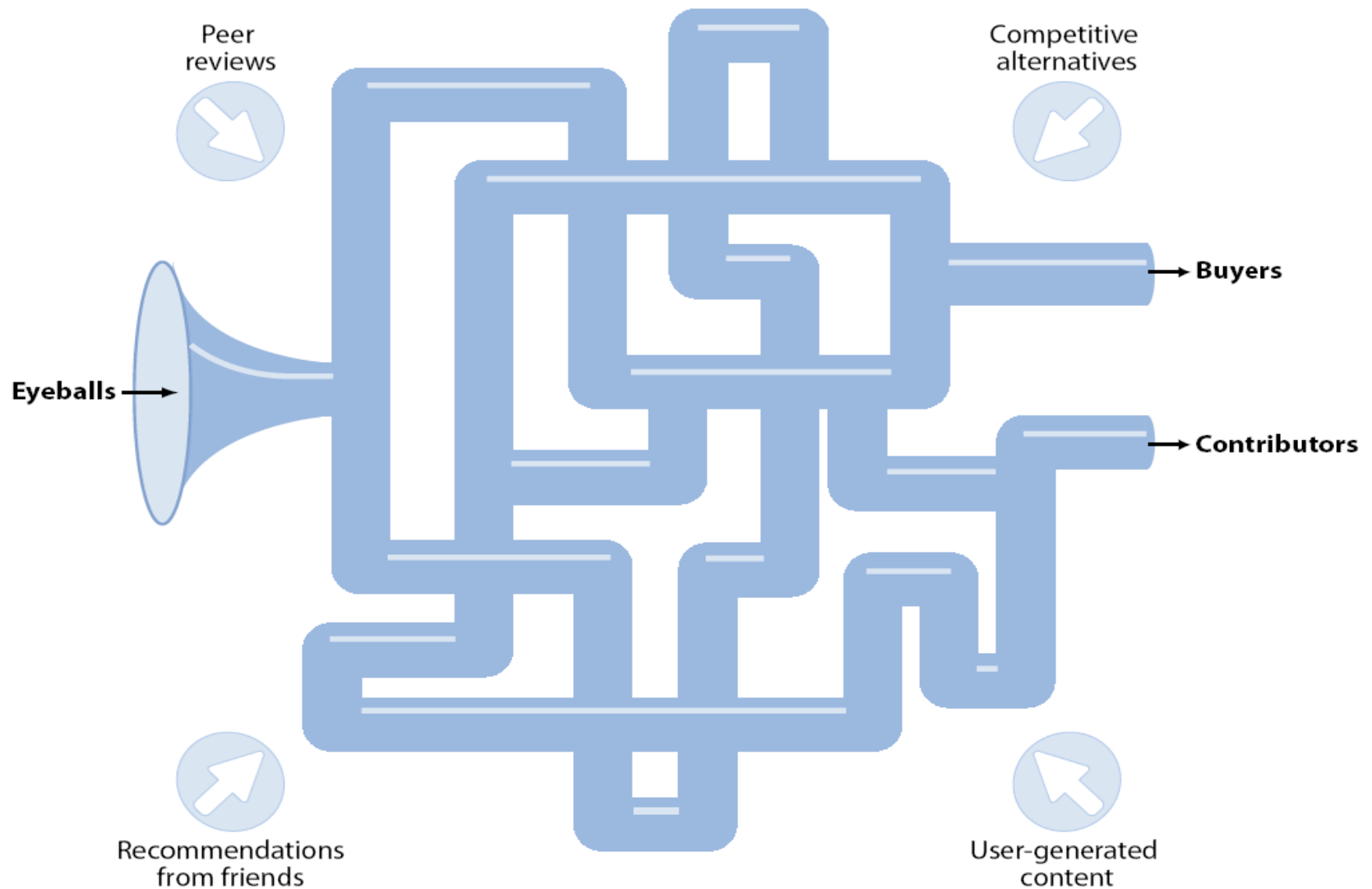
**Social CRM**



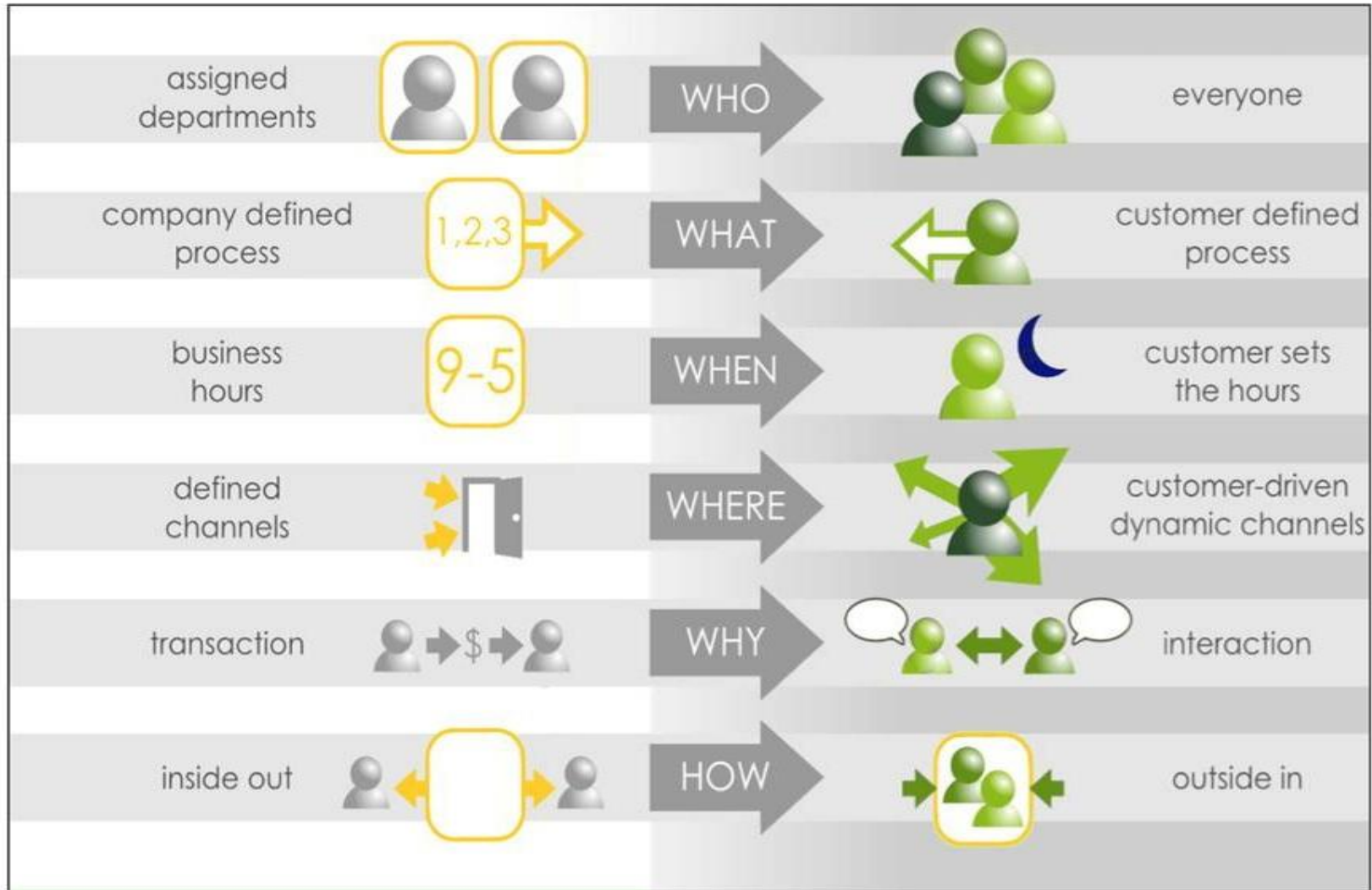
# Change: Traditional Buying Model



# Change: New Buying Model



# Change: Social Evolution



# The New Rules

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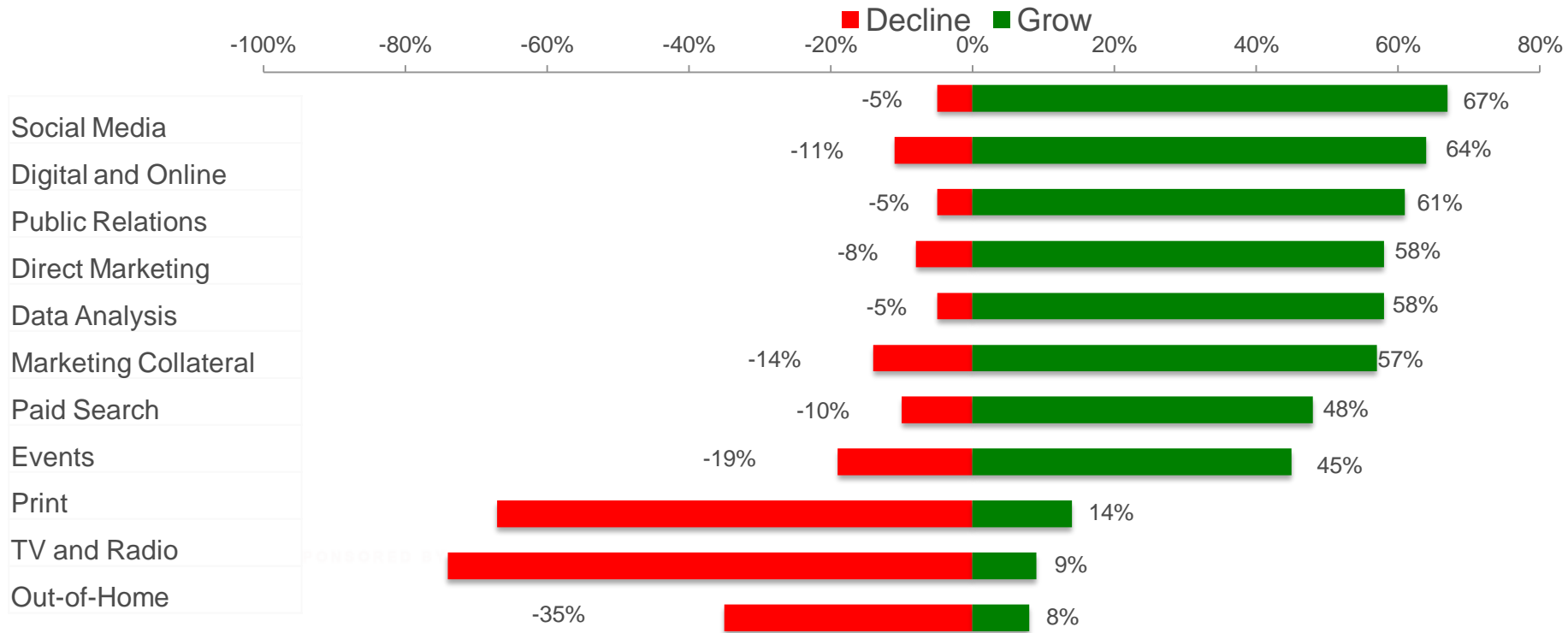


# Rule #1: You Are Not In Control



# Rule #2: Traditional Marketing is Declining

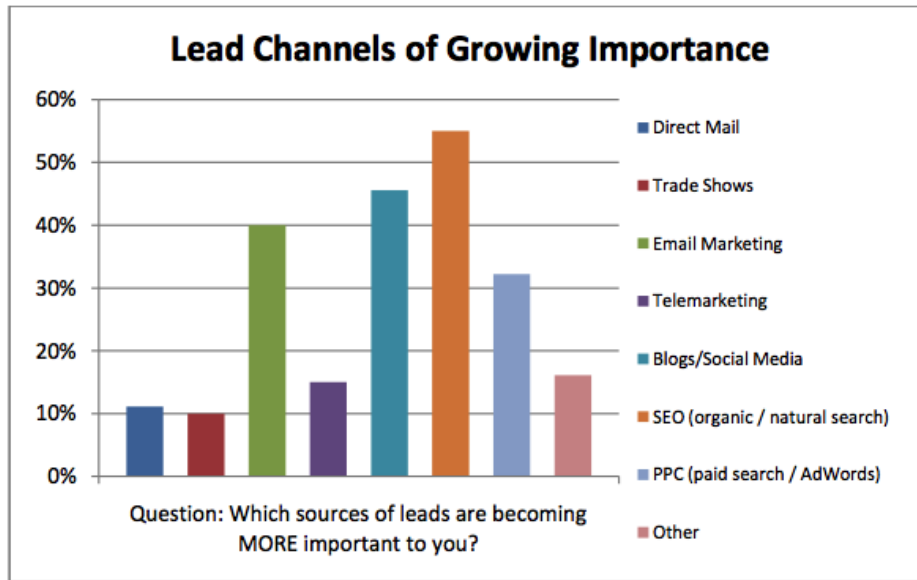
## Growth of Marketing Spend Over Next 2-3 Years



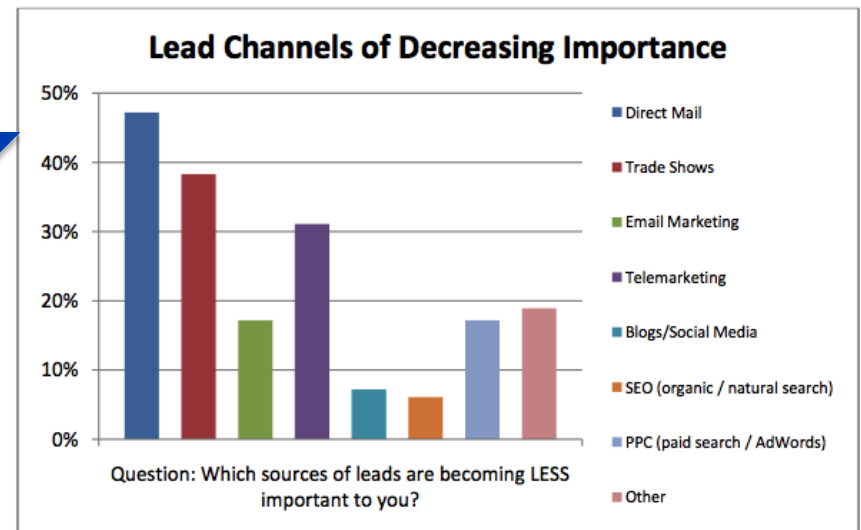
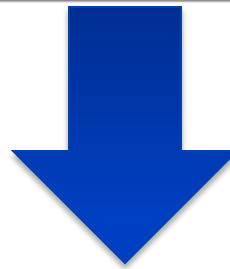
Source: Booz & Company's B2B Marketing Survey 2010

# Rule #3: People Connect with Companies

Inbound  
Permission  
Customer-Driven



Outbound  
Interruption  
Vendor-Driven



# Rule #4: Customer Service is Marketing



Start a Chat

Send an Email

Sales: 1-800-961-2888



COMPANY

MANAGED HOSTING

CLOUD HOSTING

EMAIL & APPS

CLOUD BUILDERS

Hosting Solutions

Why Rackspace

Partner Program

Information Center

Blog Community

Hosting Knowledge

ALL BACKED BY  
**FANATICAL  
SUPPORT®**

It isn't just what we do.  
It's really what makes  
us, well, us.

Find Out More

JOE  
**RACKER**  
since: 2005

Racker  
↙

↘  
Hosting  
Solutions

## MANAGED HOSTING

Customized dedicated server configurations, fully managed 24x7x365 by certified hosting experts.  
[More about Managed Hosting or a Dedicated Server](#)

LEARN  
MORE

## CLOUD HOSTING

On-demand, scalable, application, storage & web hosting, supported 24x7x365 by Cloud hosting experts.

[More about Cloud Computing](#)

**NEW!** Managed Service Level Now Available

LEARN  
MORE

## EMAIL & APPS

Business class hosted exchange & email hosting for companies large and small, managed 24x7x365 by our email specialists.

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MORE

**LET'S TALK**

SALES QUESTIONS?  
start a Live Chat

THE WORLD'S LEADING SPECIALIST IN THE HOSTING & CLOUD COMPUTING INDUSTRY

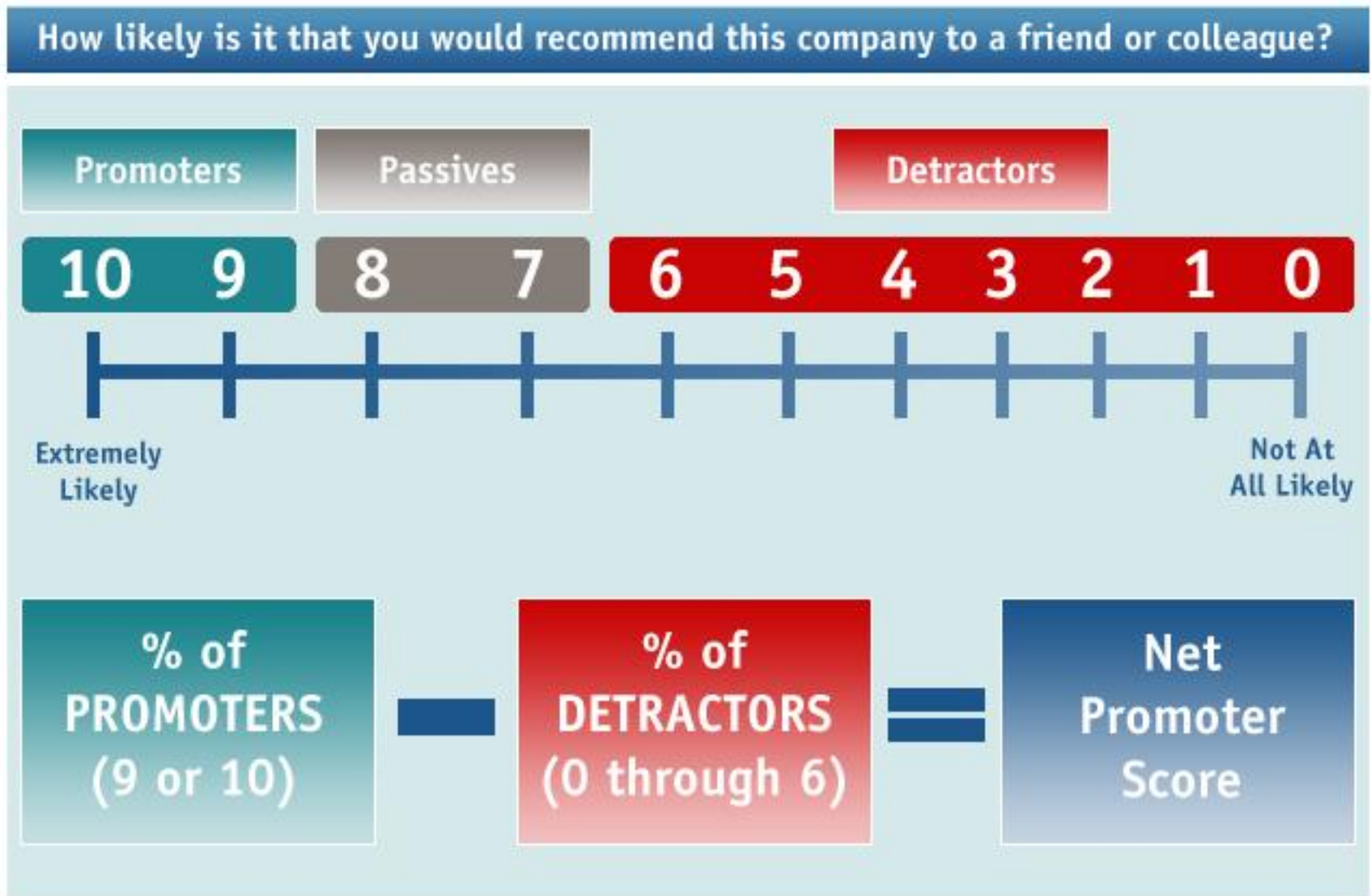
**Get Social**  
9/29/2011  
The Social Business Roadshow

SUGARCRM.

IBM

BRIXCRM™

# Rule #5: Measure, measure, measure





# Rule #6: Join the Conversation

facebook

Search

Jan Sysmans Home



Wall

Info

Friend Activity

Dam tot Damloop

Bright Ideas

iFly Magazine

KLM Worldwide

Photos

Videos

Welcome

266,307

like this

KLM

Travel/Leisure · Amstelveen



Wall

KLM · Everyone (Most Recent)

Share:  Post  Photo  Link  Video

Write something...



Will Rios

Halloo!  
Im from Brazil :)

Like · Comment · about an hour ago



Dreke Claessen

Thats nice, but I love BRrrrazil, Eu amo Brazil!

11 minutes ago · Like · 1 person



Will Rios

Brazil

11 minutes ago · Like

Write a comment...



Julia Paulina

Ik weet dat jullie Martinair (nog) niet zijn maar is er een mogelijkheid dat jullie mijn ticketnr van mijn Martinairvlucht Amsterdam – Cancun (26-08 t/m 09-09) kunnen opzoeken? De klantenservice van Martinair blijkt niet over deze gegevens te beschikken en ik wil wel graag mijn flying blue werken...

Like · Comment · about an hour ago



KLM

Hallo Julia, helaas kunnen we je hierbij niet assisteren, omdat we op dit moment nog niet in hun systeem kunnen werken.

Create a Page

You and KLM

 Anja Hebel likes this.

 KLM\_USA

People To Subscribe To See All



Vic Gundotra

3 friends are subscribed.

 Subscribe



Pete Cashmore

CEO at Mashable

2 friends are subscribed.

 Subscribe

Sponsored Create an Ad

95.7 The Game



9 and 1 in our last 10. Don't stop believing. The wild card is in reach. 95.7 The GAME is your Facebook page for the Giants comeback!

 Like · Tim Palacios likes this.

Better Than Your Stocks?

pennystockresearch.com



Will These 3 Penny Stocks Outperform Your Stocks? Free Report Reveals The Top 3 Penny Stocks For 2012...

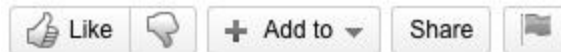
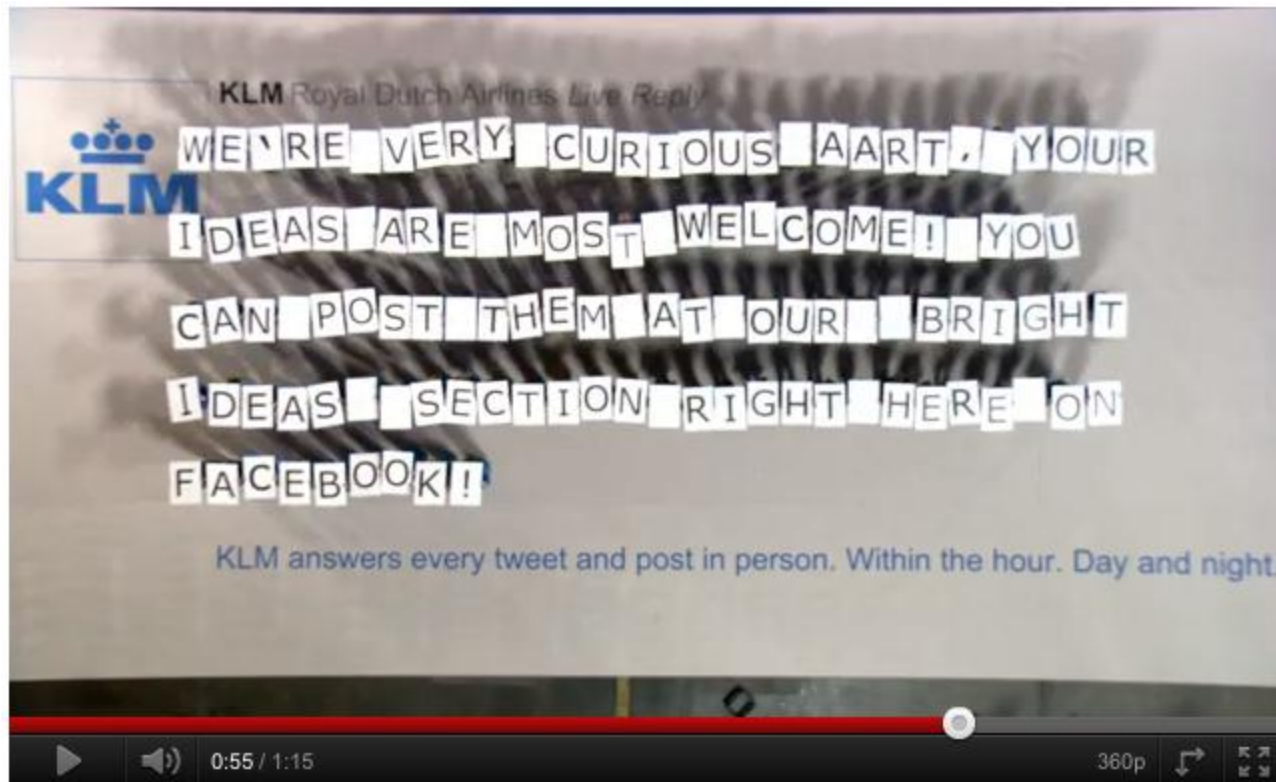
San Jose Cisco Discount

clearchoicepromotions.com



Improve your appearance with dental

# Rule #6: Join the Conversation



5,498

Uploaded by [KLMRoyalDutchAirline](#) on Sep 19, 2011

To show the world KLM's helpful social media service, we've replaced normal Facebook and Twitter typed responses with a living alphabet made up of 140 KLM employees. This dedicated crew responds to tweets and posts in a unique way, by running around and assembling the answer live before your eyes, within the hour.

14 likes, 0 dislikes

As Seen On:  
[KLM Blog](#)

KLM answers every tweet and post in person. Within the hour. Day and night

# Rule #7: Integrate People With Technology



Sydney restaurant replaces menus with iPads

<http://www.redmondpie.com/sydney-restaurant-uses-ipad-as-a-menu-card/>

# The New Rules

- The World Has Changed
  - Customers believe other customers, not companies
  - Social networks enable customers
- The New Rules of Customer Interaction
  - Rule #1 – You are not in control
  - Rule #2 – Traditional Marketing Tactics Are Declining
  - Rule #3 – People Connect With Companies
  - Rule #4 – Customer Service is the New Marketing
  - Rule #5 – Measure, Measure, Measure
  - Rule #6 – Join the Conversation
  - Rule #7 – Integrate People with Technology
- What Now?
  - We'll discuss in the “How do you get started” section

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# ***How do you get started?***

**Tom Schuster, VP & GM EMEA, SugarCRM**



# Start With the Customer



Start with  
the customer



# Put the customer at the center



**CRM**

# CRM

# Customer Relationship Management

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## CRM is about Customers

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# CRM is about **Acquiring,** **Retaining** and **Growing** Customers

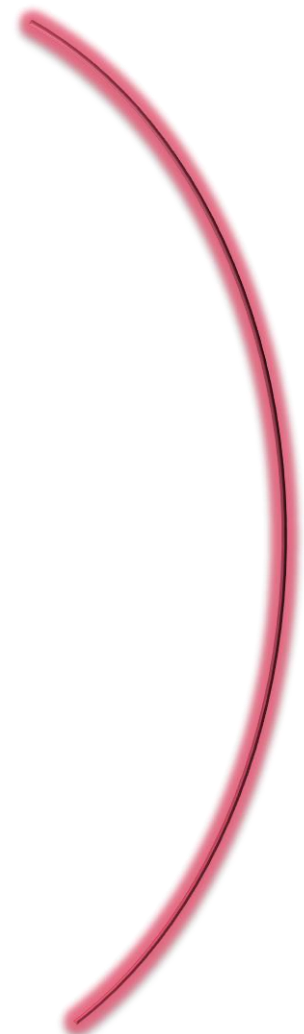
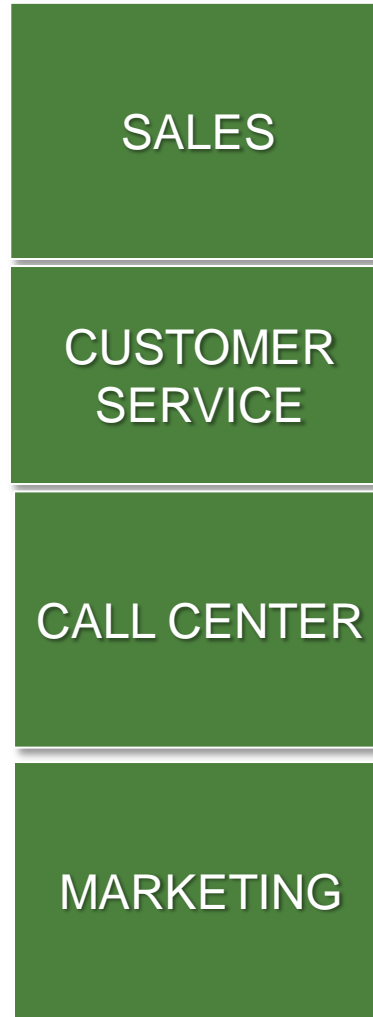
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# Enable the sales edge

INNER CORE

SALES EDGE

CUSTOMERS



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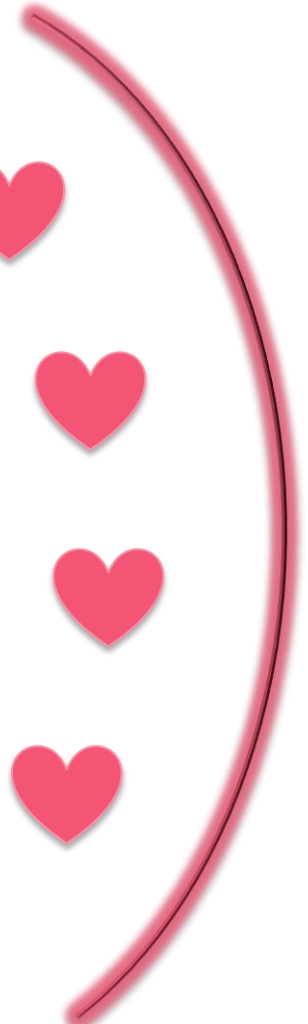
# CRM Made Social: Enable the customer edge

INNER CORE

SALES EDGE

PARTNERS

CUSTOMERS



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# Social CRM



Social CRM is an extension of, not a replacement for, CRM

©2010 CHESS MEDIA GROUP

# CRM made Simple

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# CRM Made Simple

**Social CRM**

**Intuitive**

**Open**

**Flexible**

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# Getting started with Social CRM

Step 1: Implement an Open CRM System

Step 2: Customise the user interface and processes

Step 3: Integrate the essential back end systems

Step 4: Implement a flexible infrastructure

Step 5: Provide collaboration tools

Step 6: Use the Social Tools of choice

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# Getting started with Social CRM

Social CRM

## Step 1: Implement an Open CRM System

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# Open

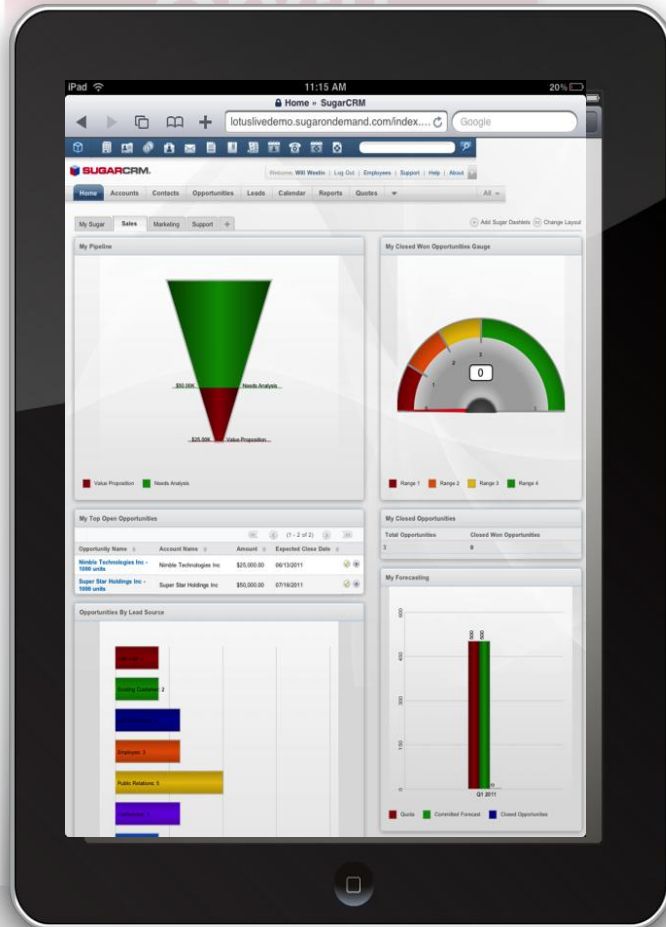
# Social CRM

## Technology

- Open Source
- Users Have Control
  - No Lock-In
  - Transparent and Simple
  - Easy Integration of Social Tools
- Web Standards

## Community

- Hundreds of Extensions
  - 800+ on SugarForge
  - 300+ on SugarExchange
- Qualified Partners



# Getting started with Social CRM

Social CRM

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**Step 2: Customise the user interface and processes**

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# Intuitive

# Social CRM



## For Users

- Web 2.0 User Experience
- Works the Way **YOU** Work

## For Administrators

- Simple Customisation
- Seamless Upgrades

# CRM Made Mobile



- iPhone

- Android



- Blackberry



- iPad



- Offline Sync



- HTML5 Charts



# Getting started with Social CRM

Step 1: Implement an Open CRM System

Step 2: Customise the user interface and processes

**Step 3: Integrate the essential back end systems**

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# Getting started with Social CRM

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**Step 4: Implement a flexible infrastructure**

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# Flexible

# Social CRM

# Cloud

VENDOR

**SUGAR ON-DEMAND™**

PUBLIC

**IBM SmartCloud**  
**amazon**  
web services™  
**Windows Azure™**

## RUN ANYWHERE

- Any Device
- Any Platform
- Any Cloud



**PRIVATE**

PARTNER

 **BRIXCRM™**



# Flexible

# Social CRM



## Data

- Complete access to your data
- Control of your data
- Choice of Database
  - My-SQL
  - SQL-Server
  - DB-2 (next release)

**Own Your Data!**

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# Getting started with Social CRM

Social CRM

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Step 2: Customise the user interface and processes

Step 3: Integrate the essential back end systems

Step 4: Implement a flexible infrastructure

**Step 5: Provide collaboration tools**

Step 6: Use the Social Tools of choice

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## Step 5: Provide collaboration tools



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Collaboration

Conferencing

# Getting started with Social CRM

Social CRM

Step 1: Implement an Open CRM System

Step 2: Customise the user interface and processes

Step 3: Integrate the essential back end systems

Step 4: Implement a flexible infrastructure

Step 5: Provide collaboration tools

**Step 6: Use the Social Tools of choice**

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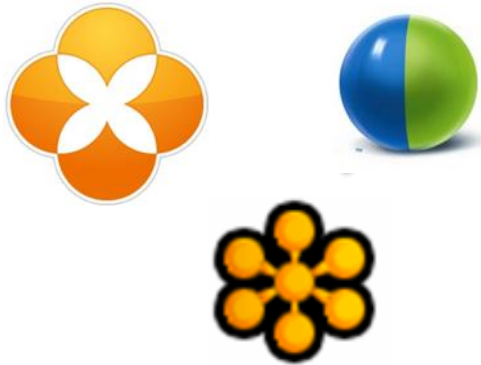
## Step 6: Use the Social Tools of choice



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# Components of a Social CRM

Conferencing



Cloud



Windows Azure



Collaboration



Community

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# CASE STUDY: HILLEL

- Hillel is the largest organization in the world with a focus on university-age Jewish student
- Hillel serves young adults at more than 550 colleges and communities in North America, SouthAmerica, Israel, and the former Soviet Union.
- Hillel seeks to enrich the lives of Jewish undergraduate and graduate students so that they may enrich the Jewish people and the world.

# Hillel Uses Social CRM to Connect with College Students

Hillel needed a CRM solution that would enable real-time tracking by staff and interns to evaluate the impact that peer engagement initiatives were having on a campus and across campuses.



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# System Requirements

- Flexible enough to allow data migration from a highly customized legacy system
- Optimized for different user levels, including hundreds of Hillel staff and student interns
- Cross-browser compatible
- Multi-lingual

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# The Result

- Sugar's social and mobile capabilities have allowed Hillel to implement a mobile-friendly Social CRM system
- Integrated with popular media channels such as Facebook and Twitter.  
- This encourages high user adoption among staff and interns.
- SPONSORED BY Users can enter new student data into REACH from any location, anytime.

*“Our newly updated REACH database program powered by Sugar Professional even features a mobile application that allows students and professionals to track their interactions and relationship-building in the fast paced and constantly changing world in which our college students live.”*

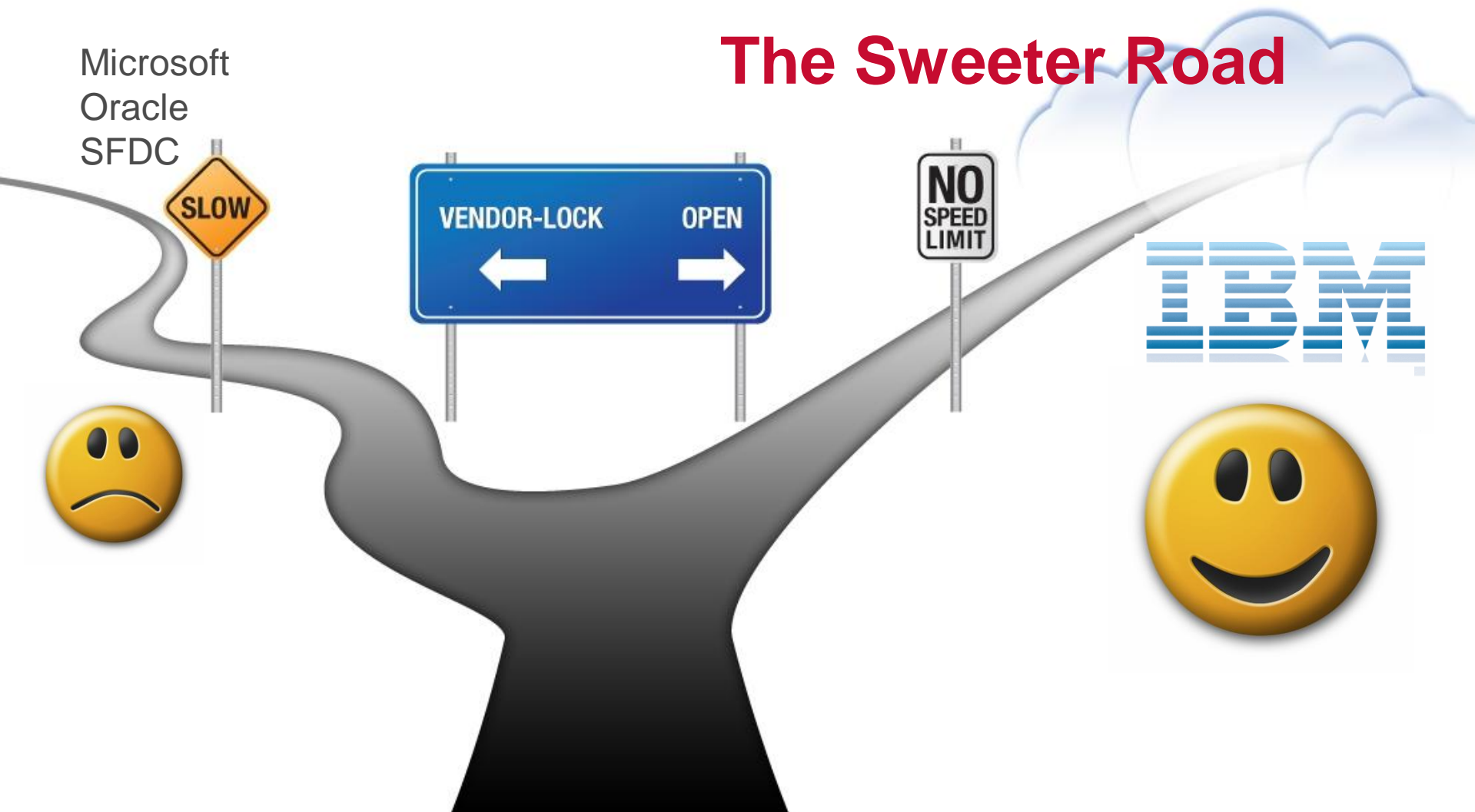
Wayne L. Firestone  
President, Hillel: The Foundation for Jewish  
Campus Life

# Getting started with social CRM

- Start with the customer
- Choose an Open CRM System
- Enable a flexible Cloud infrastructure
- Integrate Collaboration and conferencing
- Utilise the social tools of choice



# The Sweeter Road



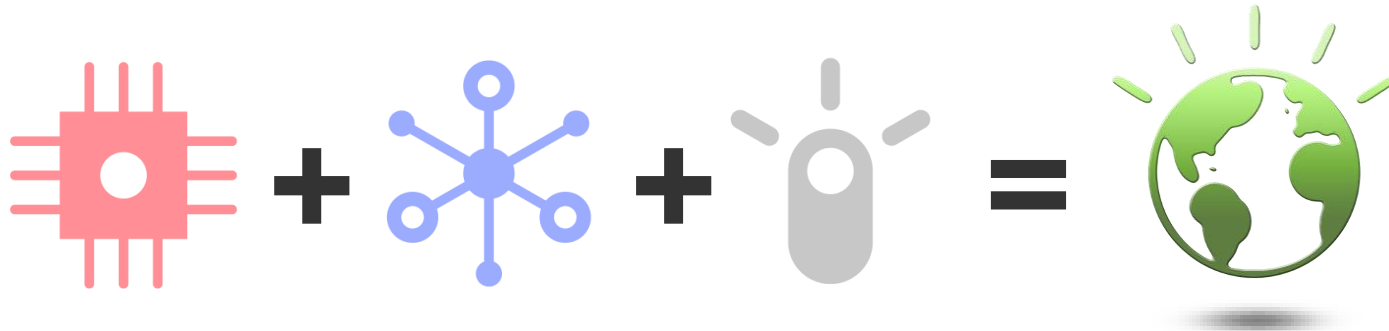
# Overview

10:30 – 10:40	Introduction & Welcome	Jan-Maarten Plomp, BrixCRM
10:40 – 11:05	From Social Media to Social	Ronald Velten, IBM
11:05 – 11:30	The New Rules of Social CRM	Larry Augustin, SugarCRM
11:30 – 11:50	How Do You Get Started	Tom Schuster, SugarCRM
<b>11:50 – 12:15</b>	<b>Best Practices for a Social Business</b>	<b>Ronald Velten, IBM</b>
12:15 – 12:45	Break	
12:45 – 13:05	Customer Testimonial: Welland	Rogier Oonk
13:05 – 13:25	Customer Testimonial: RealConnections	Erik Vos
13:25 – 14:15	A Day in the Life of a Social Business	Andrey Andreev, SugarCRM
14:15 – 14:30	Q & A	All
14:30	Conclusion	

# Become a Smarter Business with SugarCRM on IBM

**RONALD VELTEN**

Director Marketing, Communications & Citizenship  
IBM Benelux



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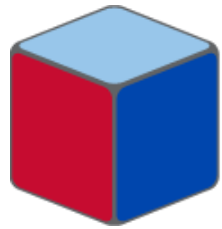
**“It is not just about doing  
social media for doing it,  
but how you use these emerging  
technologies for social business”**

- Ronald Velten ☺

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# SUGARCRM®

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# Sugar on IBM: Hardware



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- Complement your investment in IBM systems
- Optimized experience on IBM Systems i, x, and p
- Extensive benchmarking with the POWER7 processor
- IBM delivers the premier server platform for SugarCRM solutions

# Sugar on IBM: IBMSmartCloud Enterprise



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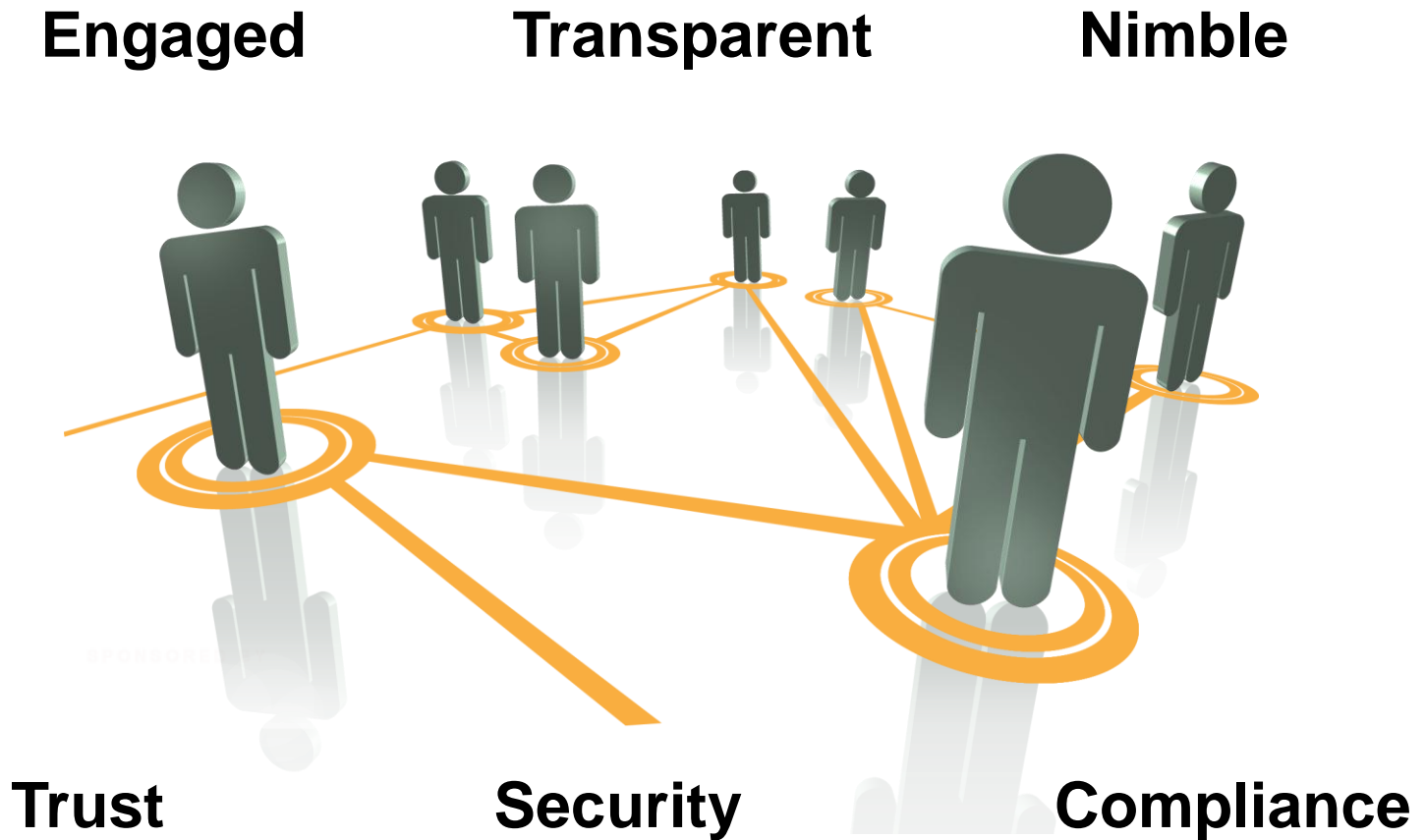
- SugarCRM is certified on the IBM Cloud
- Combine benefits of Cloud computing with Enterprise grade security and SLAs
- Easily scale your global deployment
- Comes pre-installed
- All you need is your licence key

# A Social business is about optimizing your value chain, internally and externally



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# True Social Businesses embrace networks of people to create business value



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Get Social. **Do Business.**



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# Social business in the cloud

## Our strategy

Simplify and improve business interactions inside and outside the enterprise

Expand the enterprise perimeter to the cloud

Deliver new business value through seamless integration with your applications



My Network



Communities



Activities



Files



Meetings



Events



Chat



eMail

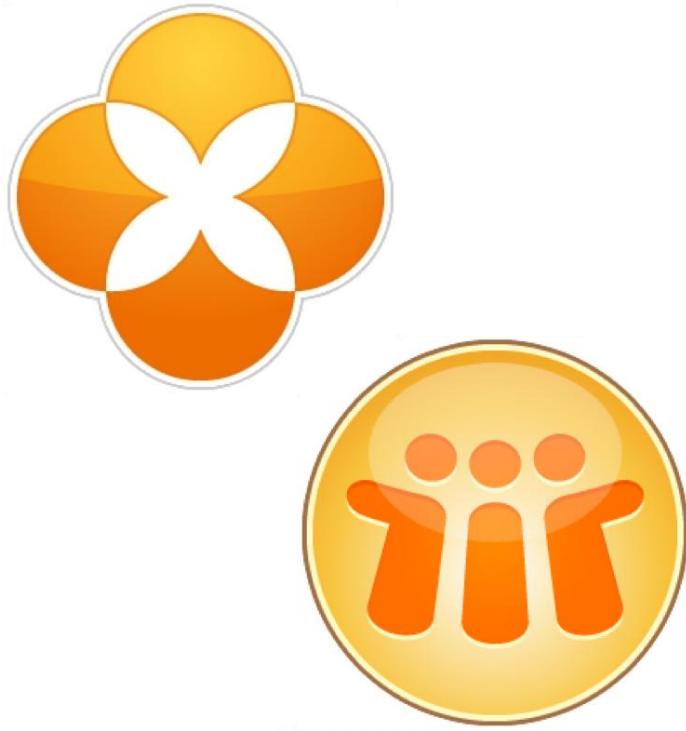


Charts



Survey Forms

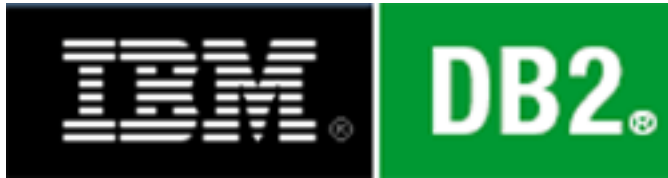
# Sugar on IBM: LotusLive and Lotus Notes



- Manage your LotusLive documents inside Sugar
- Schedule, manage, and start LotusLive online meetings from within Sugar
- Instantly synchronize your Lotus Notes email, calendar, tasks, and contact information with Sugar

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# Sugar on IBM: Data



- Run Sugar on top of IBM DB2 database (*Dec 2011*)

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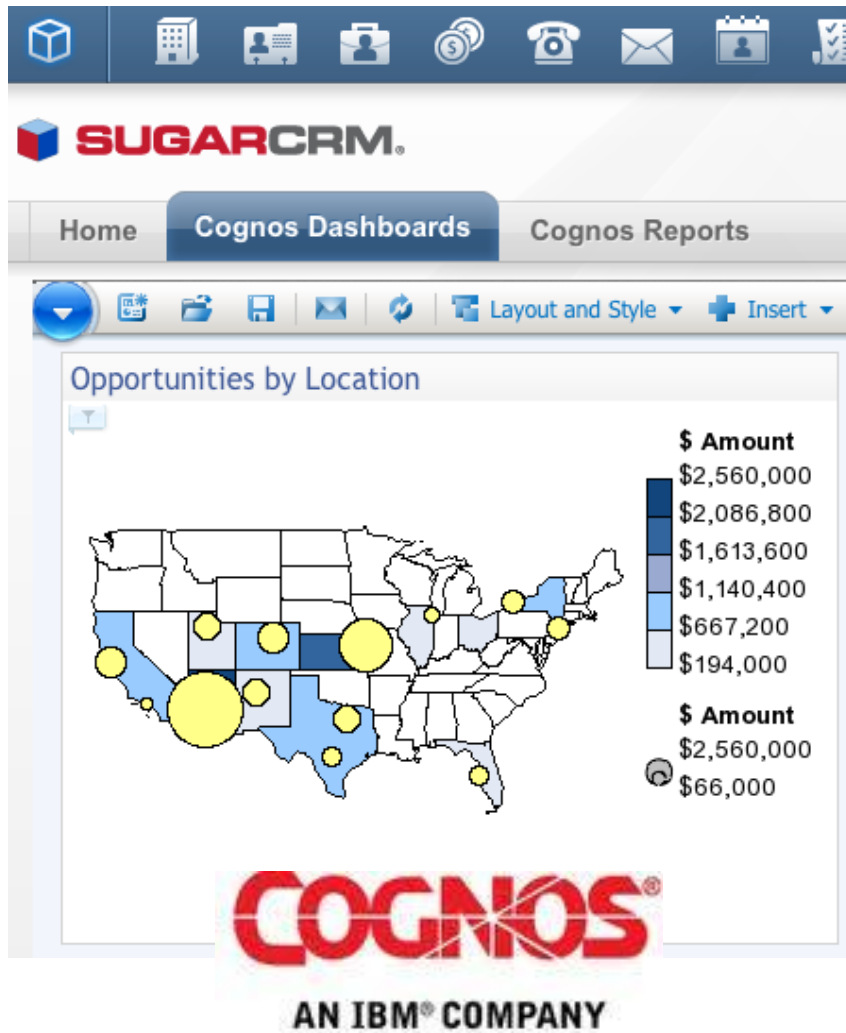
# Sugar on IBM: Web Services Integration



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- Combine Sugar with WebSphere Cast Iron Cloud to integrate and synchronize all your key business data
- Configurable templates to get get started in days.
- Deploy securely in the cloud or on-premise for maximum flexibility

# Sugar on IBM: Business Intelligence



- Combine SugarCRM data with other data sources.
- Incorporate all your critical information into one system.
- View current and historical data about customers side-by-side.
- Enhance SugarCRM reporting with a full breadth of BI capabilities.

# Sugar on IBM: Marketing

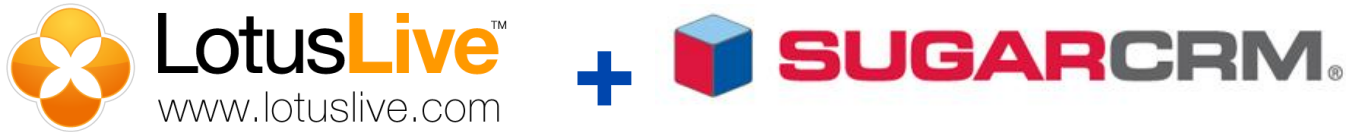


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- Combine Sugar with SPSS Direct Marketing to choose the right customers and prospects to target with your marketing campaign
- Understand your customers in greater depth
- Improve your marketing campaigns
- Maximize the ROI of your marketing



# Why IBM & SugarCRM for social business



**deliver Social Business either on premises or in the cloud**

**delivers social solutions that connects you to people  
both *inside and outside* your company**

**IBM is all about connecting social and collaborative capabilities**

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For more info: [www.sugarcrm.com/ibm](http://www.sugarcrm.com/ibm)



**“You don’t have a choice on whether we **DO** social media, the question is how well you will **DO** it.”**

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- Erik Qualman





IBM

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***Break***

**Back at 12:45**

