



#IBMSocialBiz #sugarcrm

# Get Social

The Social Business Roadshow

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**epicom**

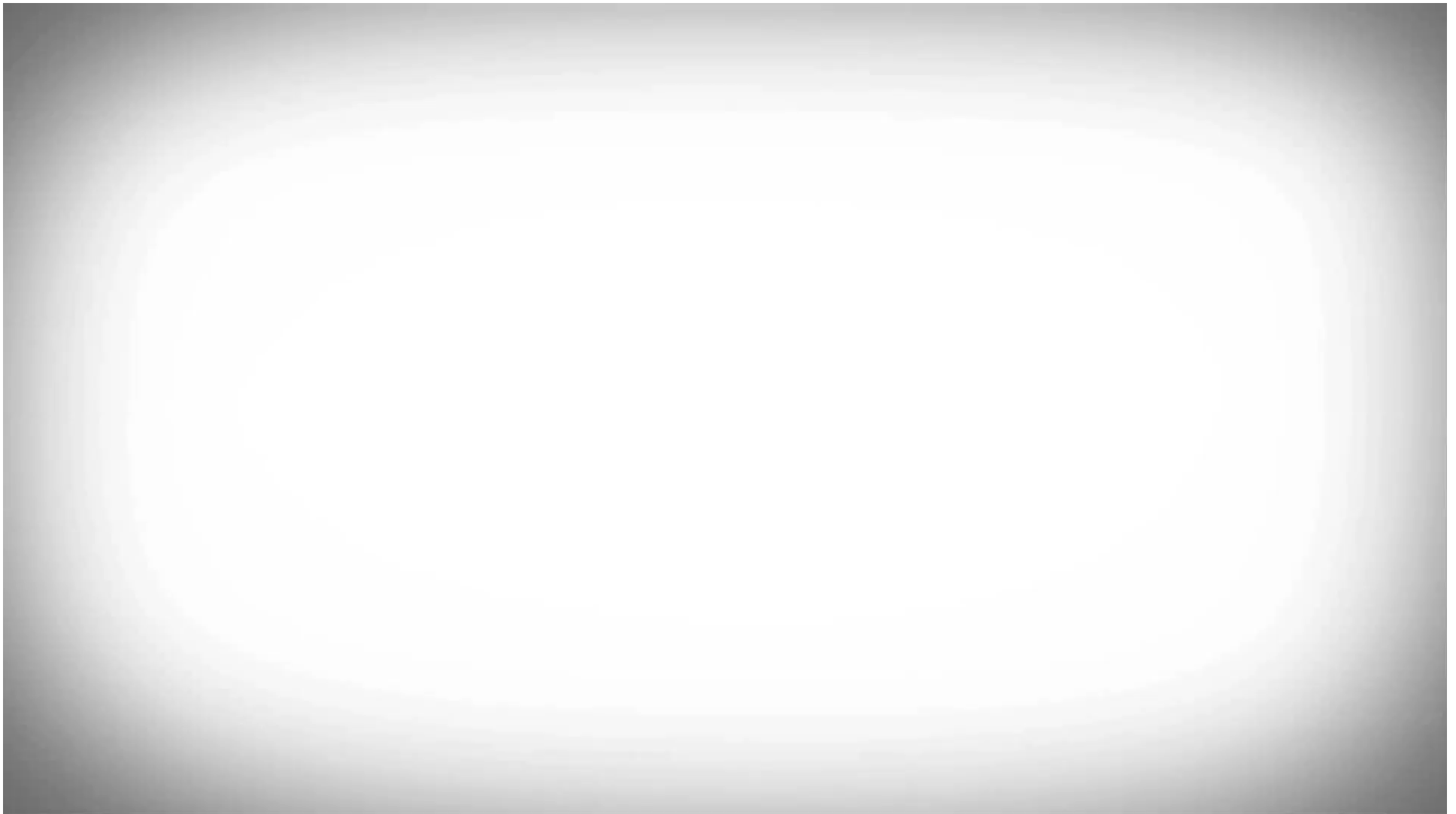
# **Welcome and Intro Video**

**Kay Freund**

**IBM Alliance Marketing**

**IBM**





# **Introductions**

**Kay Freund**

**IBM Alliance Marketing**

**IBM**



# Our Speakers Today

- Eric Stumberg



@TengoInternet



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# Agenda



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- Customer Testimonials
- The New Rules of Social CRM (*Sugar*)
- From Social Media to Social CRM (*IBM*)  
---- Coffee break -----
- How Do You Integrate Social Media (*Sugar*)
- Best Practices for Becoming a Social Business (*IBM*)
- A Day in the Life of the Social Business

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# Overview



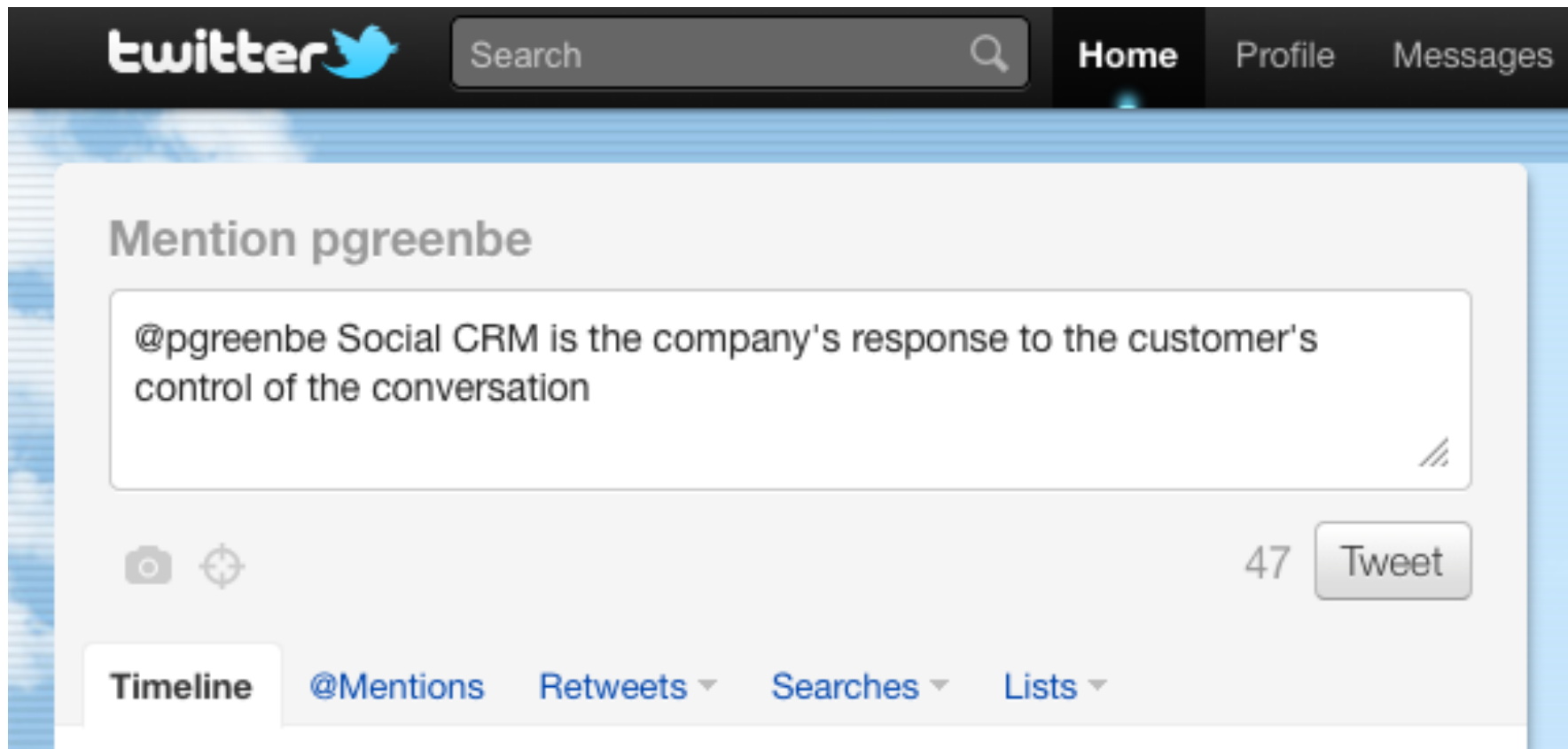
#IBMSocialBiz #sugarcrm

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# Social CRM Is...





# Customer Case Study: TengoInternet

**Eric Stumberg,  
Founder and CEO,  
TengoInternet**



# Contents

- Key Company Facts
- SugarCRM Implementation Rationale
- SugarCRM Enhancements since migration
- SugarCRM Current Projects
- Conclusions

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# Key Facts

- Founded in January 2002 - 1 employee, self-funded
- Deliver turnkey WiFi/private network solutions - including unlicensed wireless network design, installation, commissioning, network assurance, guest support and ancillary applications
- Primary customers are private and public campground operators - but also serve marinas, hotel, campuses and man-camps
- 850 customers in 48 states, Canada and Mexico, including access to over 450,000 RVers in 2010
- Award Winning Growth and Service: Inc 5000 - 2009, 2010, 2011; ARVC Supplier of the Year 2009 and 2010; GABA Customer Service 2010
- 2010 revenues of \$4.2M with 19 employees => planned growth to \$30.0M in 5-7 years

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# Rationale - January 2010

- Multiple, unconnected platforms - Salesforce, Ruby-on-Rails - and a 2010 acquisition integration
- Lacked visibility to customer health, service level & drivers
- Email, double entry & manual workarounds were standard “processes” - not scalable
- Expensive licensing fees through SalesForce
- Goal -
  - One platform, One-touch, Automate
  - “how will this work with 5000 customers?”

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# “Hey, We’re Walking!”

- Network Management
  - Cases
  - Service Level
  - Escalations
- Service Work Order Custom Module
- Marketing
  - Net Promoter Survey & Hugs
  - Web-to-Lead
  - Newsletters
  - Customer profitability
  - Contract Administration

# “Hey, We’re Walking!” - cont’ d

- Accounts Receivable Policy
- Sales
  - Outbound Email Campaign
  - External Network Design/ Quoting tool integration
  - Tax rate pull from external data base
  - Process Rule Enforcement
  - Stage Tracking from Lead to Commissioning
  - Forecasting, Stage & Activity Tracking
- Calendar visibility and synchronization

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# “Wonder Years” - Current

- “Whack-a-mole” Network Response - Phone/SMS/Email-Automation/ Integration
- Integration to Quickbooks
- Employee Performance Management

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# Conclusions

- Great decision for Company - ROI, NPS, TCB
- Flexibility allows business processes to be built naturally - no tool dictating rules and we are self-deploying most of new tools
- Excellent Time-to-Implementation
- Simple: Easy to pickup for new employees - Intuitive
- It is THE company platform

“It just makes our lives easier. Period...  
Using it more, not less than 20 months ago.”

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# **TengoInternet**

## **Contact Information**

**Mr. Eric Stumberg**  
Founder & CEO  
eric@tengointernet.com  
512.469.7660



# Overview



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# The New Rules of Social CRM

Chuck Coulson

VP Business Development, SugarCRM



# CRM

CRM empowers you to  
gain and retain customers



# CRM



CRM empowers you to gain and retain customers by providing greater visibility into sales, marketing and support so you can deliver an excellent customer experience

# CRM



- Enables collaboration
- Provides visibility
- Gives financial predictability
- Boost revenue
- Leverages existing technology investment

# Social CRM



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

# Social CRM



Quote: Mark Fidelman

“Social CRM is simply changing traditional CRM and adding multichannel social technologies, social analytics and social engagement strategy to help Sales, Marketing and Customer Service be more productive.”

# Change

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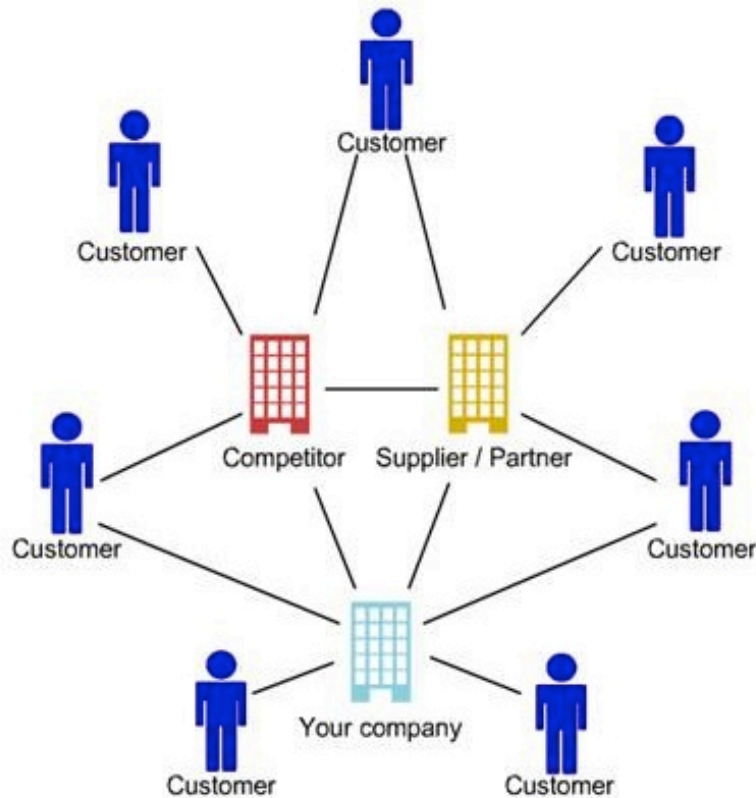


**SUGARCRM.**

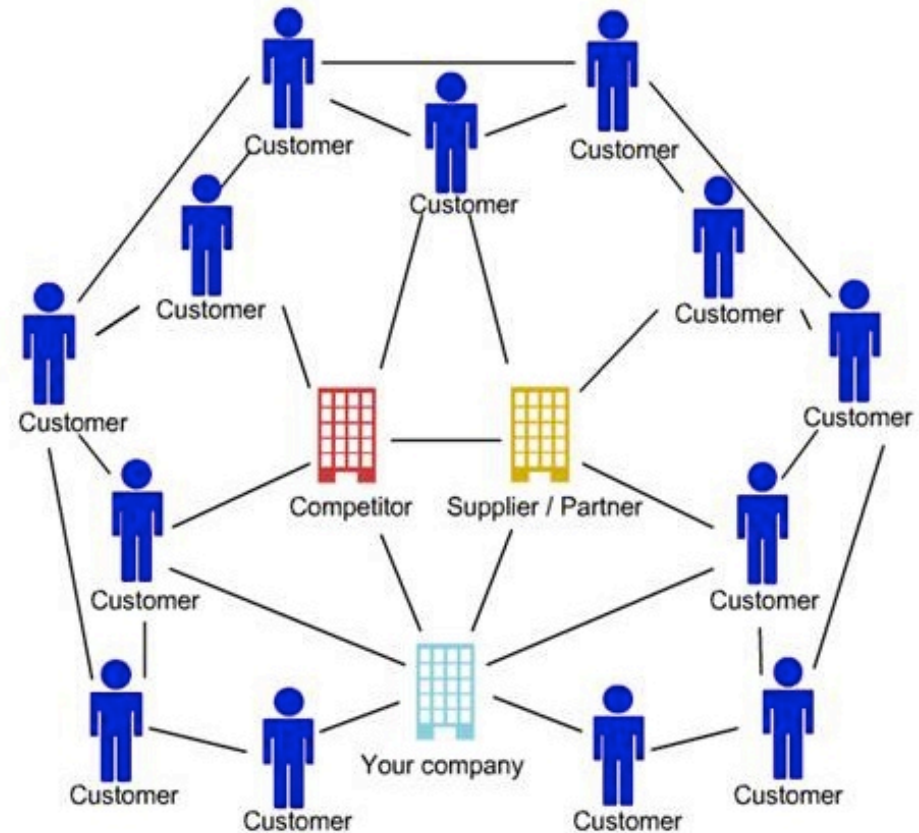


# Change: Customers Believe Customers Not Companies!

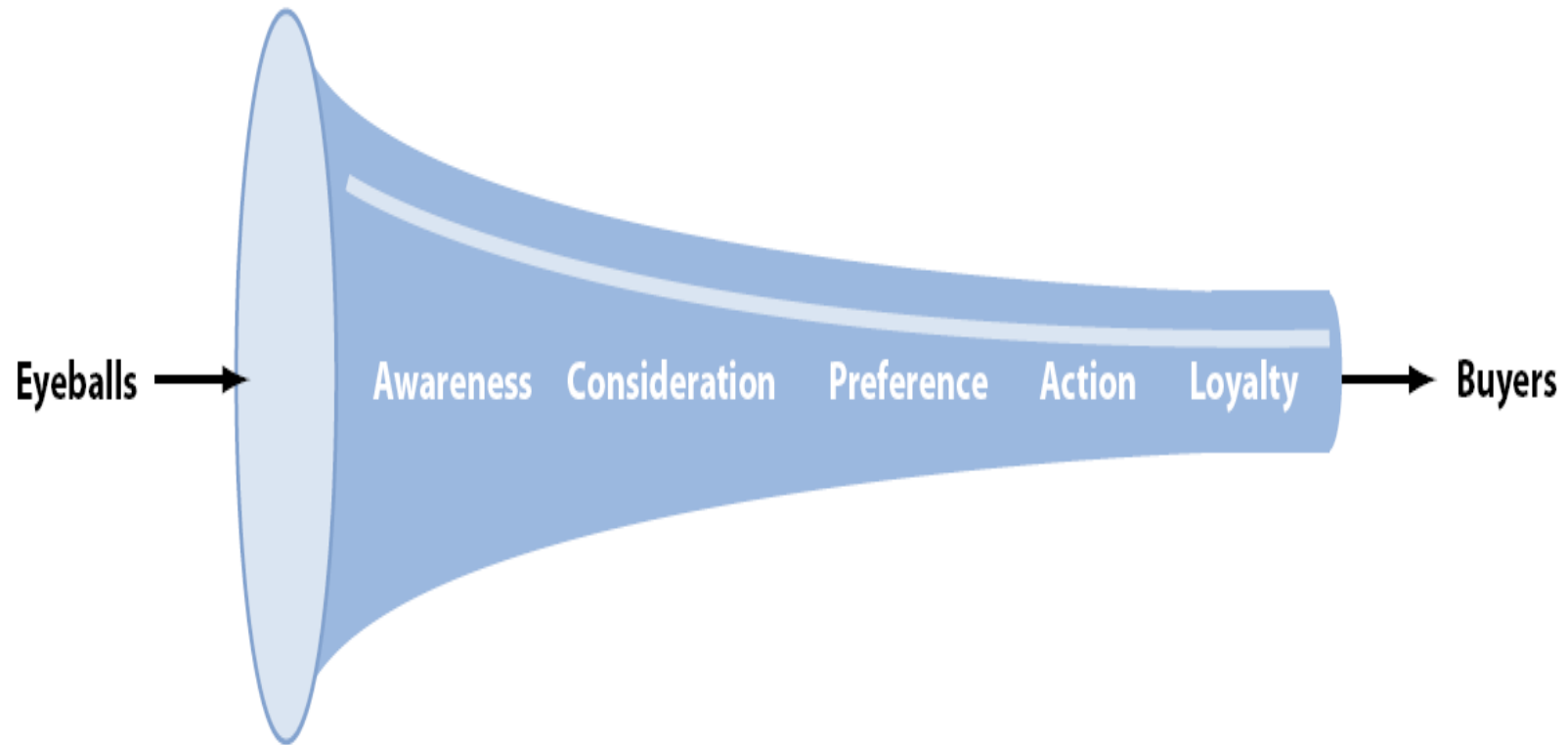
**Old World CRM**



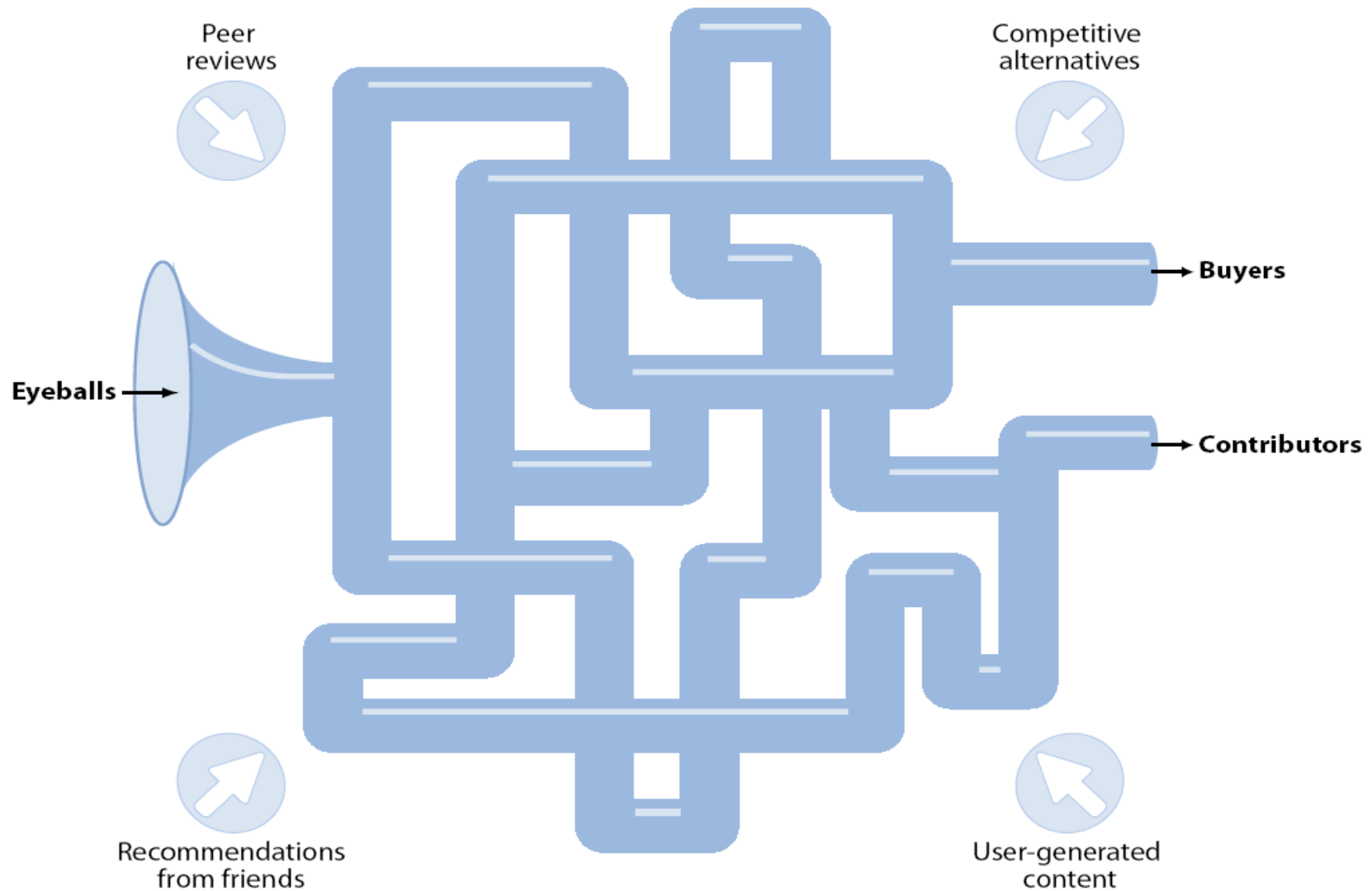
**Social CRM**



# Change: Traditional Buying Model



# Change: New Buying Model



# Change: Social is Changing Business



# The New Rules

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# Rule #1: You Are Not In Control

## United Breaks Guitars

sonsofmaxwell

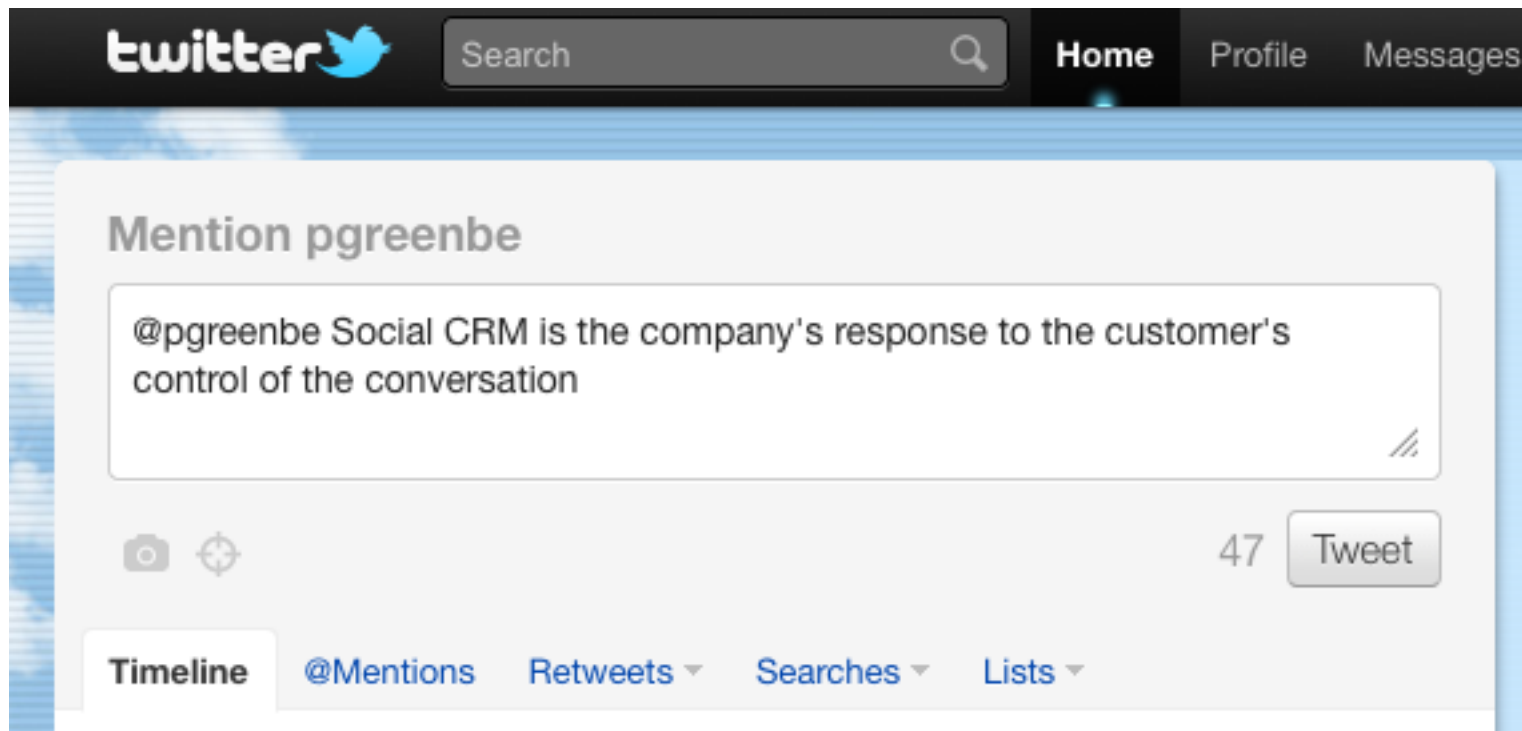
17 videos

Subscribe

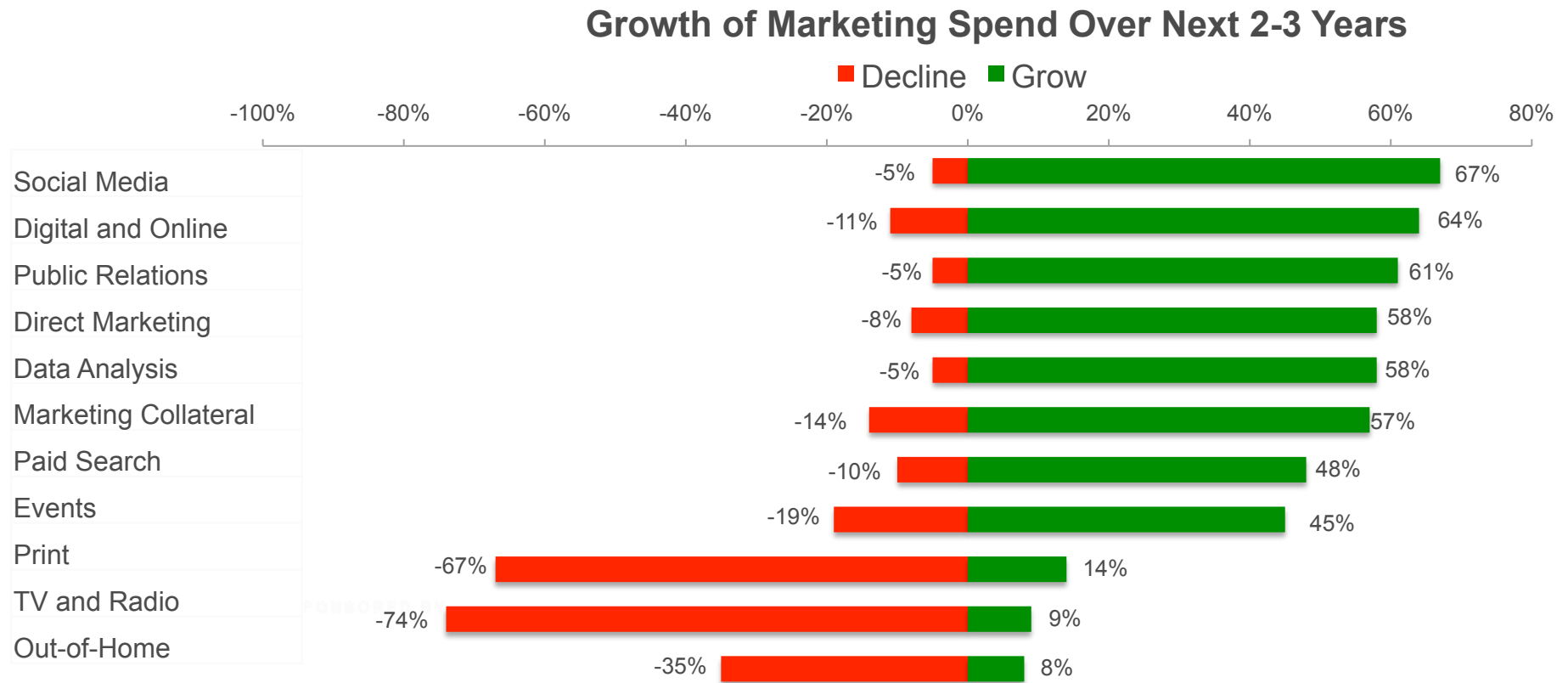


10,836,195

# Customers Manage You

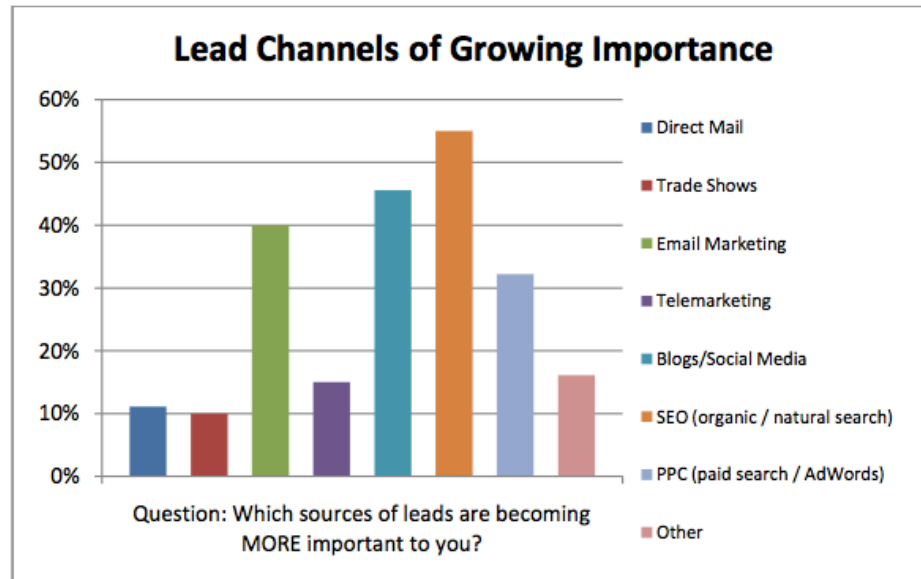


# Rule #2: Traditional Marketing is Declining

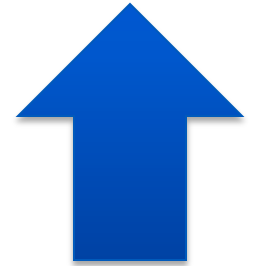


Source: Booz & Company's B2B Marketing Survey 2010

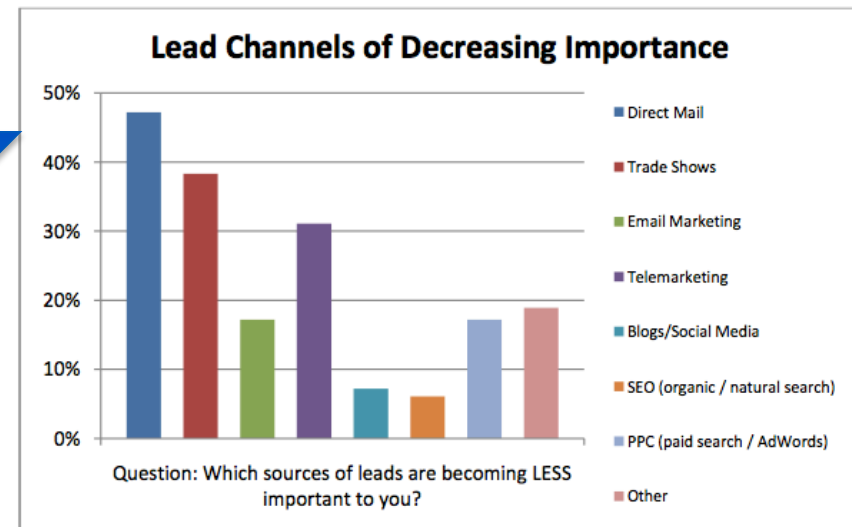
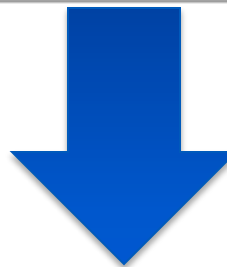
# How People Connect with Companies



Inbound  
Permission  
Customer-Driven



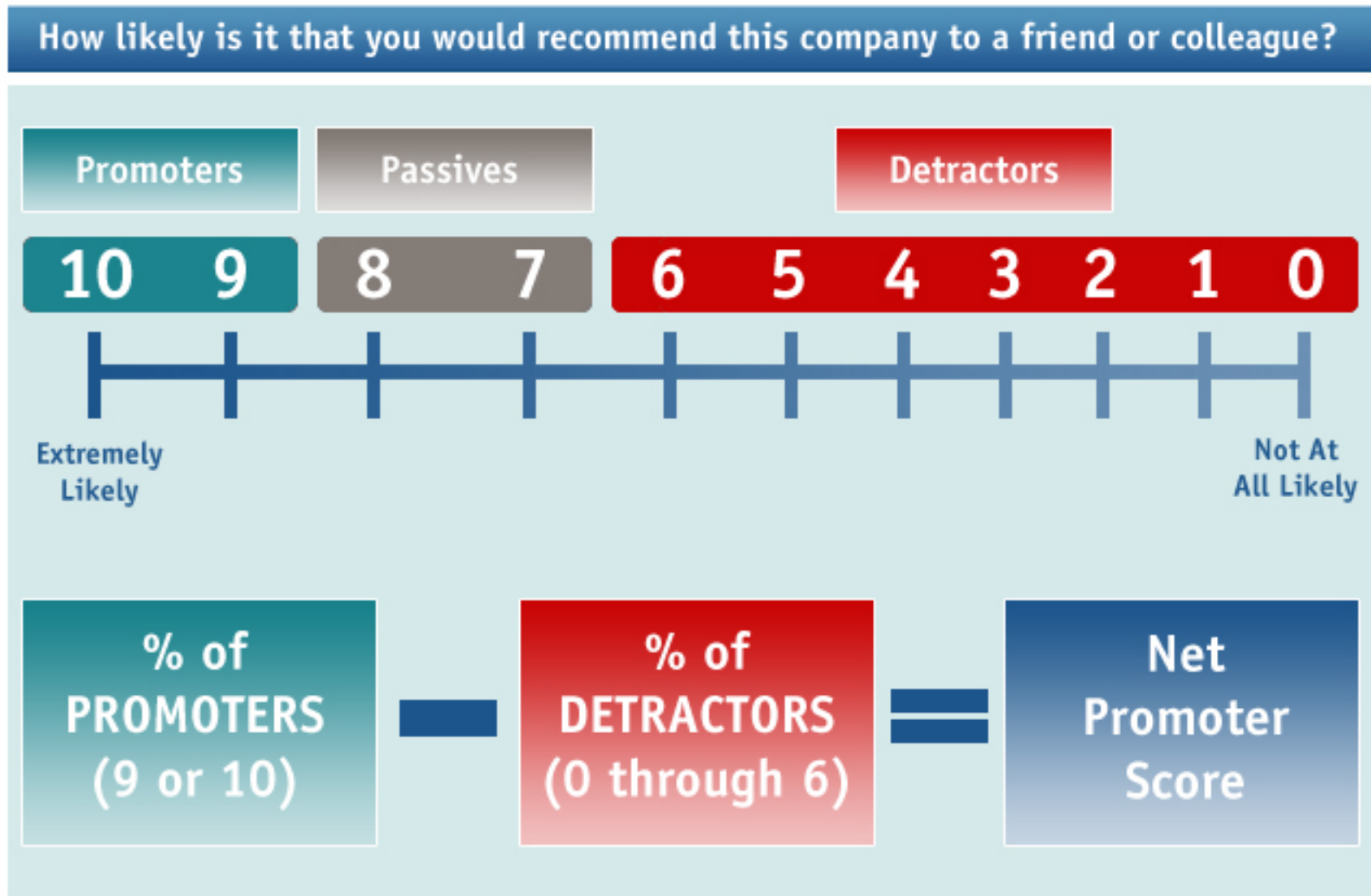
Outbound  
Interruption  
Vendor-Driven



## Rule #3: Customer Service IS Marketing



# The Ultimate Question



# Rule #4: Join the Conversation

## Kevin Smith 'too fat' to fly Southwest

By **Bob Meadows**, PEOPLE.com  
February 15, 2010 10:49 a.m. EST

People.com



Kevin Smith has battled his weight for years and took to Twitter to talk about being kicked off a flight.

### STORY HIGHLIGHTS

- Airline officials said Smith's removal was for the "safety and comfort of all customers"
- Smith originally purchased two tickets, but decided to fly standby on an earlier flight
- He was given a \$100 voucher and arrived in Burbank,

(PEOPLE.com) -- Kevin Smith's most famous role is a guy who rarely speaks. But he's got a lot to say -- much of it profane -- after being kicked off a Southwest Air flight because he didn't fit comfortably into the seat.

"You [messed] with the wrong sedentary processed-foods eater!" Smith, whose next film, "Cop Out," comes out February 26, posted on Twitter.

## Southwest Tweets, Blogs Apology to Kevin Smith



February 14, 2010 by **Pete Cashmore**  
800



206 people like this. Be the first of your friends.

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[BrightTalk.com/IntelVirtualization](http://BrightTalk.com/IntelVirtualization)

Filmmaker Kevin Smith sent a series of exasperated Tweets this weekend claiming that he'd been kicked off a Southwest Airlines flight for being "too fat".

Proving, perhaps, the speed at which Twitter can spread messages about your brand, the Tweets have been picked up by the Wall Street Journal, USA Today, ABC and other major outlets.

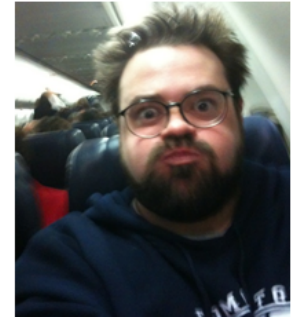
The incident, which took place on Saturday, resulted in dozens of Tweets on [Smith's account](#) (he has 1.6 million followers at the time of writing). A brief sampling:

Dear @SouthwestAir -- I know I'm fat, but was Captain Leysath really justified in throwing me off a flight for which I was already seated?

Wanna tell me I'm too wide for the sky? Totally cool. But fair warning, folks: IF YOU LOOK LIKE ME, YOU MAY BE EJECTED FROM @SOUTHWESTAIR.

Dear @SouthwestAir, I'm on another one of your planes, safely seated & buckled-in again, waiting to be dragged off in front of the normies. (accompanied by a [Twitpic](#), top right)

Southwest, which also counts over 1 million Twitter followers, responded:



## Interact Via Social Media

“85% of respondents believe companies should not just present information via social media, but use it to interact and become more engaged with them.”

- Cone Inc Report: “Social Media in Business”

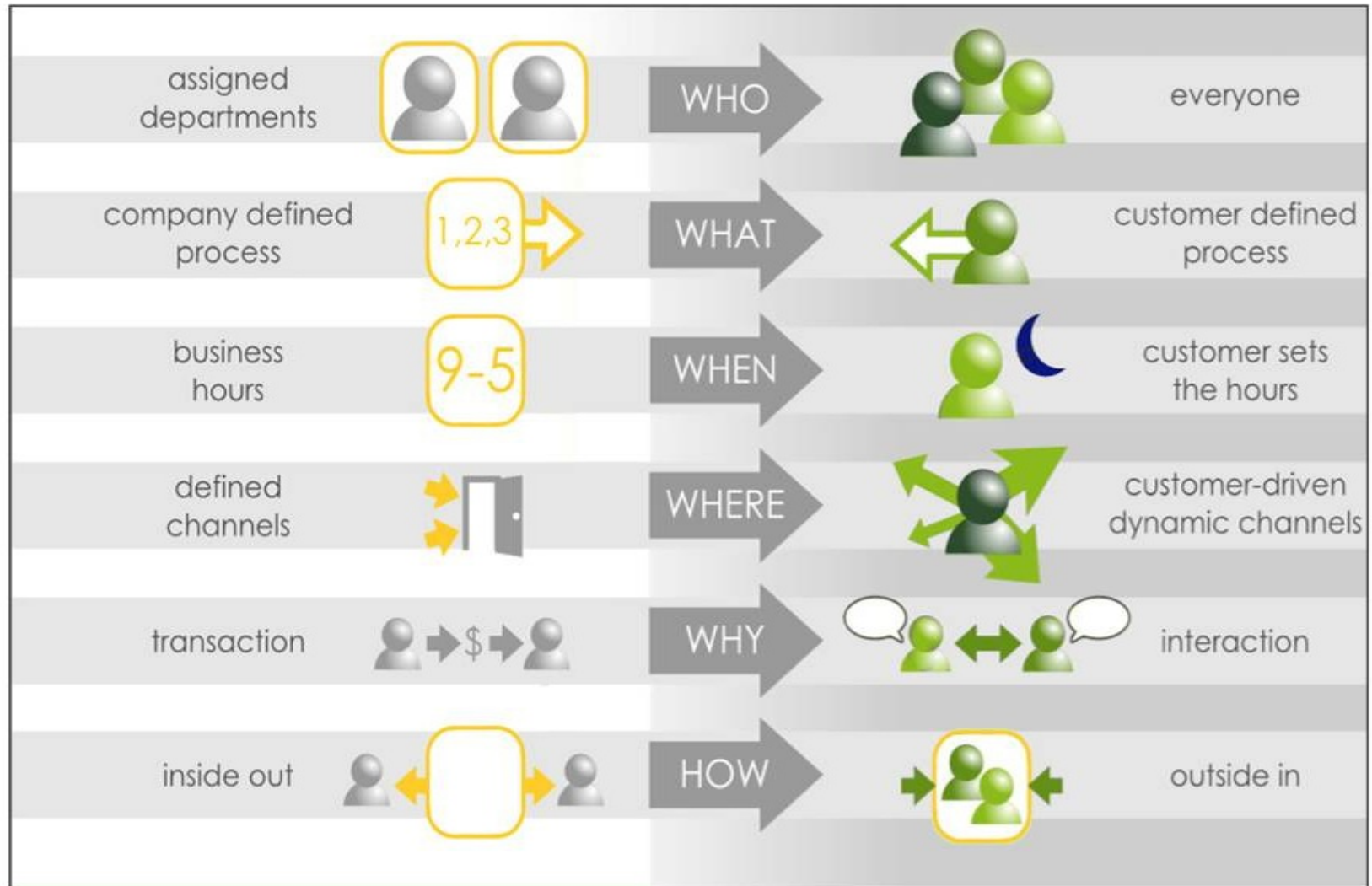
# Rule #5: Integrate People with Technology



Sydney restaurant replaces menus with iPads

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

# Evolution



# What Now?

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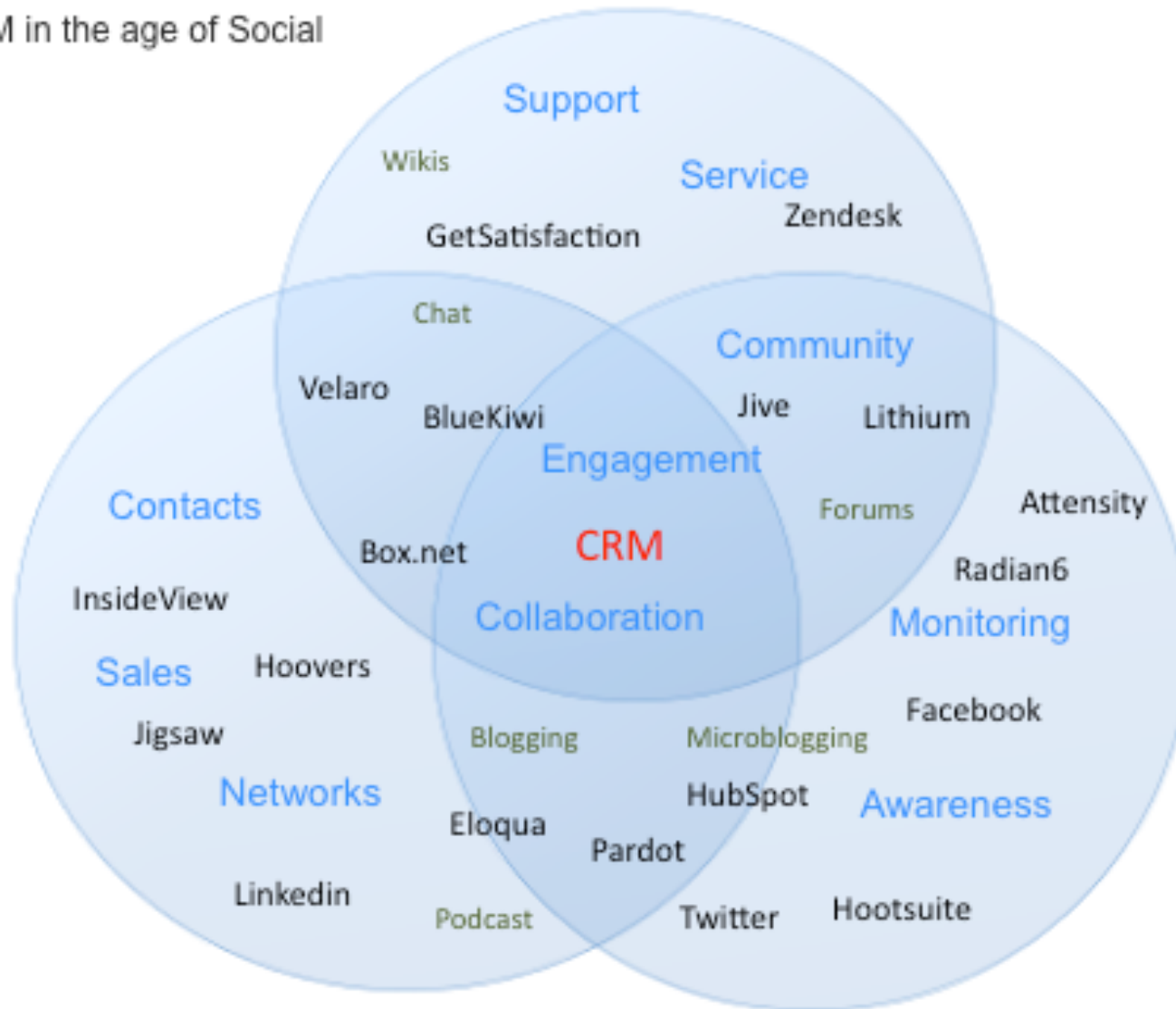


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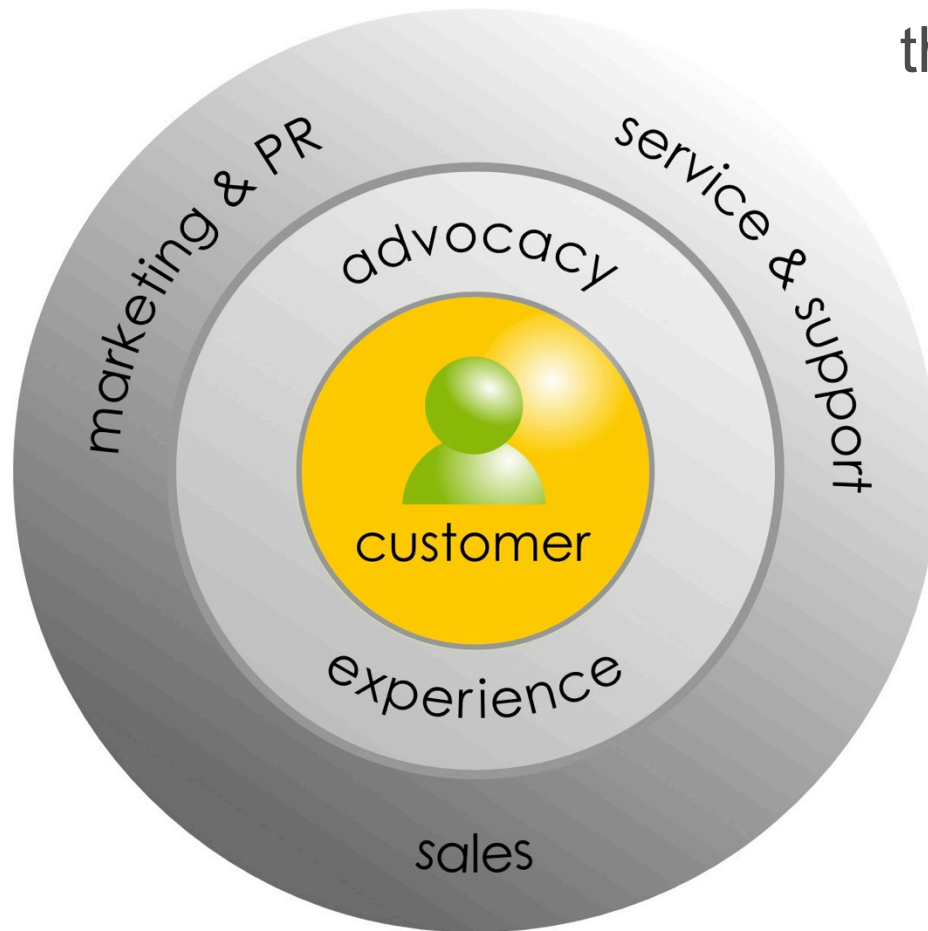
# Bring Order to Customer Management

CRM in the age of Social



# 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**

# Overview



#IBMSocialBiz #sugarcrm

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- A Day in the Life of the Social Business
- How Do You Get Started

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#IBMSocialBiz #sugarcrm

# From Social Media to Social CRM

**Mike Gerentine,  
VP Global Business Partners and Mid-Market,  
IBM**



# The Mid-Size Company

- Generally < 1,000 employees
- 65% of Global GDP
- 90% of the global workforce
- 13x more patents per employee than large enterprises
- Fastest-growing in emerging markets
- SPONSORED BY Midmarket is the Engine of Smarter Planet

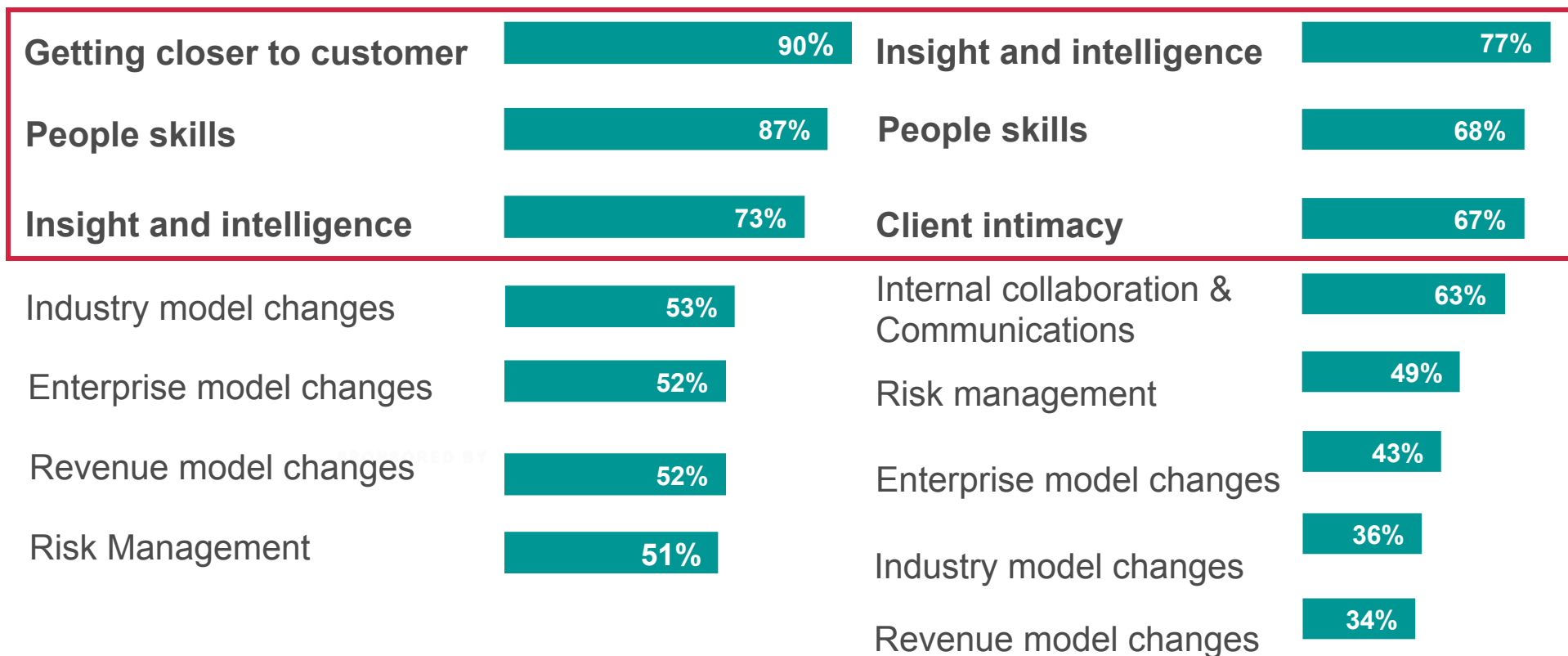


Note: This report is based on analysis done by the IBM Market Intelligence Department. This document is not meant to be a statement of direction by IBM nor is IBM committing to any particular technology or solution. Source: GMV Quarterly April 2011, total market

# CEOs and CIOs are focused on insights, clients and people skills

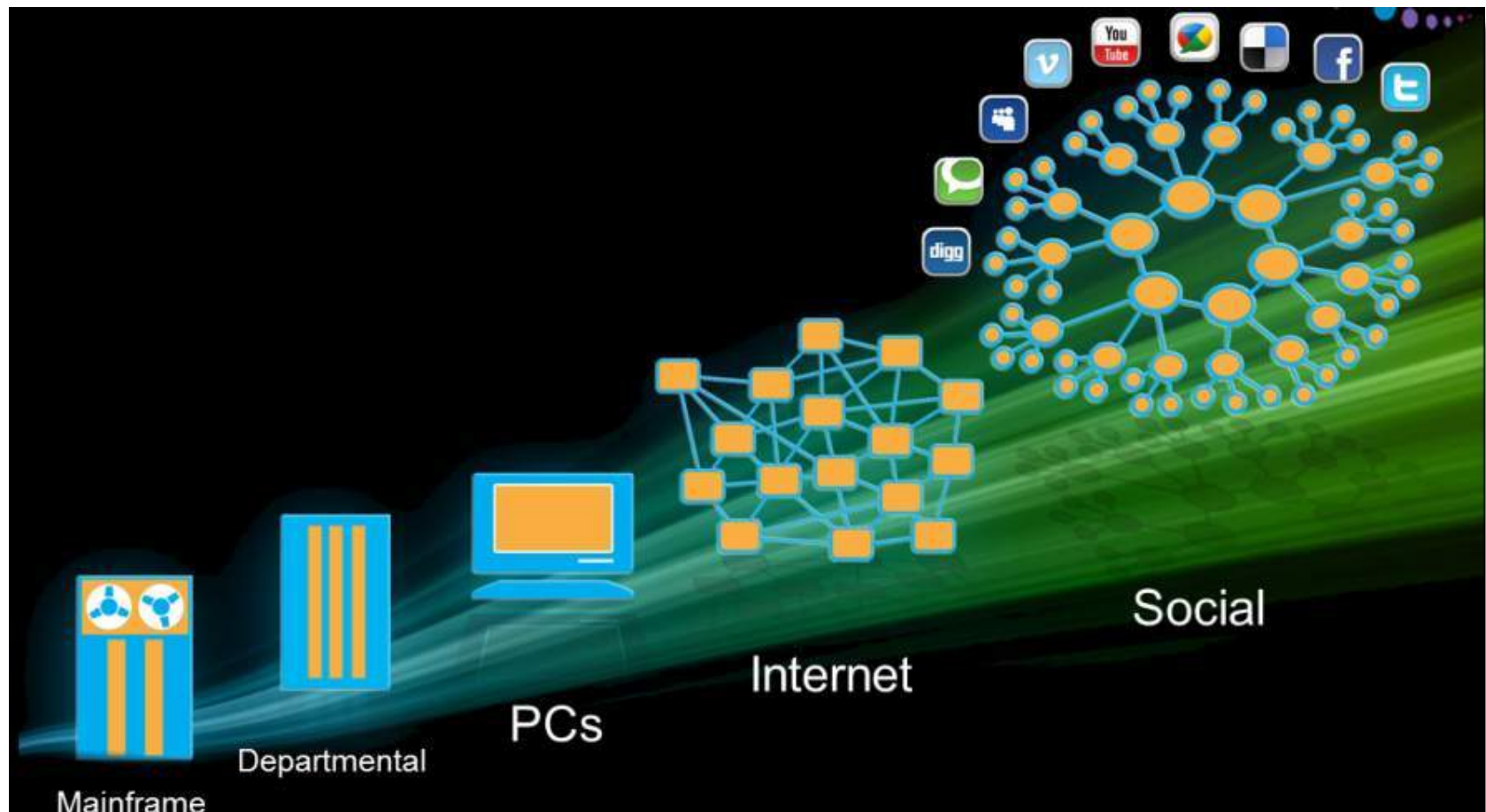
## Midmarket CEO focus over the next 5 years

## Midmarket CIO focus over the next 5 years



Source: 2011 Global CIO Study – Midmarket Report, April 2011

# The Fifth IT Era: the era of Social Business



# Customers want tangible value via social media . . . so give it to them

**Customers** interact with businesses to get something of tangible value

**Businesses** want to realize a ROI

- Think like your customers
- Collaborate as a team and with your customers
- Analyze customers' cross-channel behavior
- Monetize social media



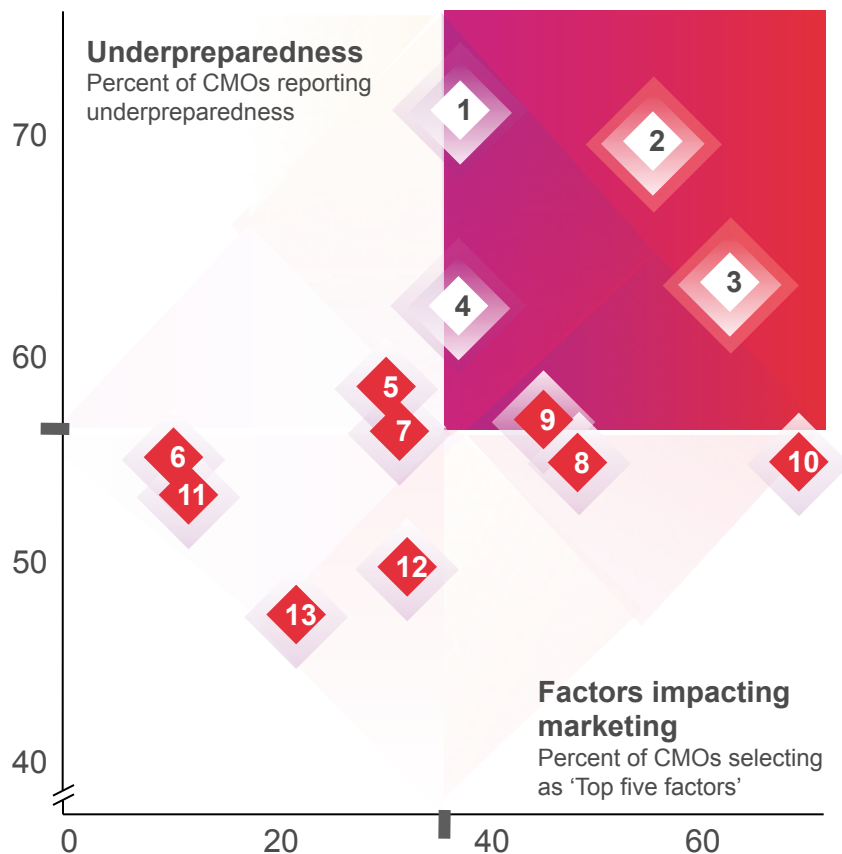
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*"We saw an opportunity to engage Cold Stone's loyal customer base and social media following to drive a measurable impact on in-store sales."*

*Dan Beem, President, Cold Stone Creamery*

# Midmarket marketing leaders are unprepared for changes critical to marketing

**Global Marketing Priority Matrix**



- 1 Decreasing brand loyalty
  - 2 Data explosion
  - 3 Growth of channel and device choices
  - 4 Social media
  - 5 Growth market opportunities
  - 6 Customer collaboration and influence
  - 7 Privacy considerations
  - 8 Global outsourcing
  - 9 Regulatory considerations
  - 10 Financial constraints
  - 11 Shifting consumer demographics
  - 12 ROI accountability
  - 13 Corporate transparency
- Mean

Source: Q7 Which of the following market factors will have the most impact on your marketing organization over the next 3 to 5 years? n1=87;  
 Source: Q8 How prepared are you to manage the impact of the top 5 market factors that will have the most impact on your marketing organization over the next 3 to 5 years? n=11 to 56 (n = number of respondents who selected the factor as important)



# Social media is generational, geographical and cultural



# Why should you care?

@southwestair Stuck in Austin,  
mechanical probs with @jetblue..can you  
get me to SF? #sxsw

*about 19 hours ago from TweetDeck*



davepeck  
Dave Peck

Speed

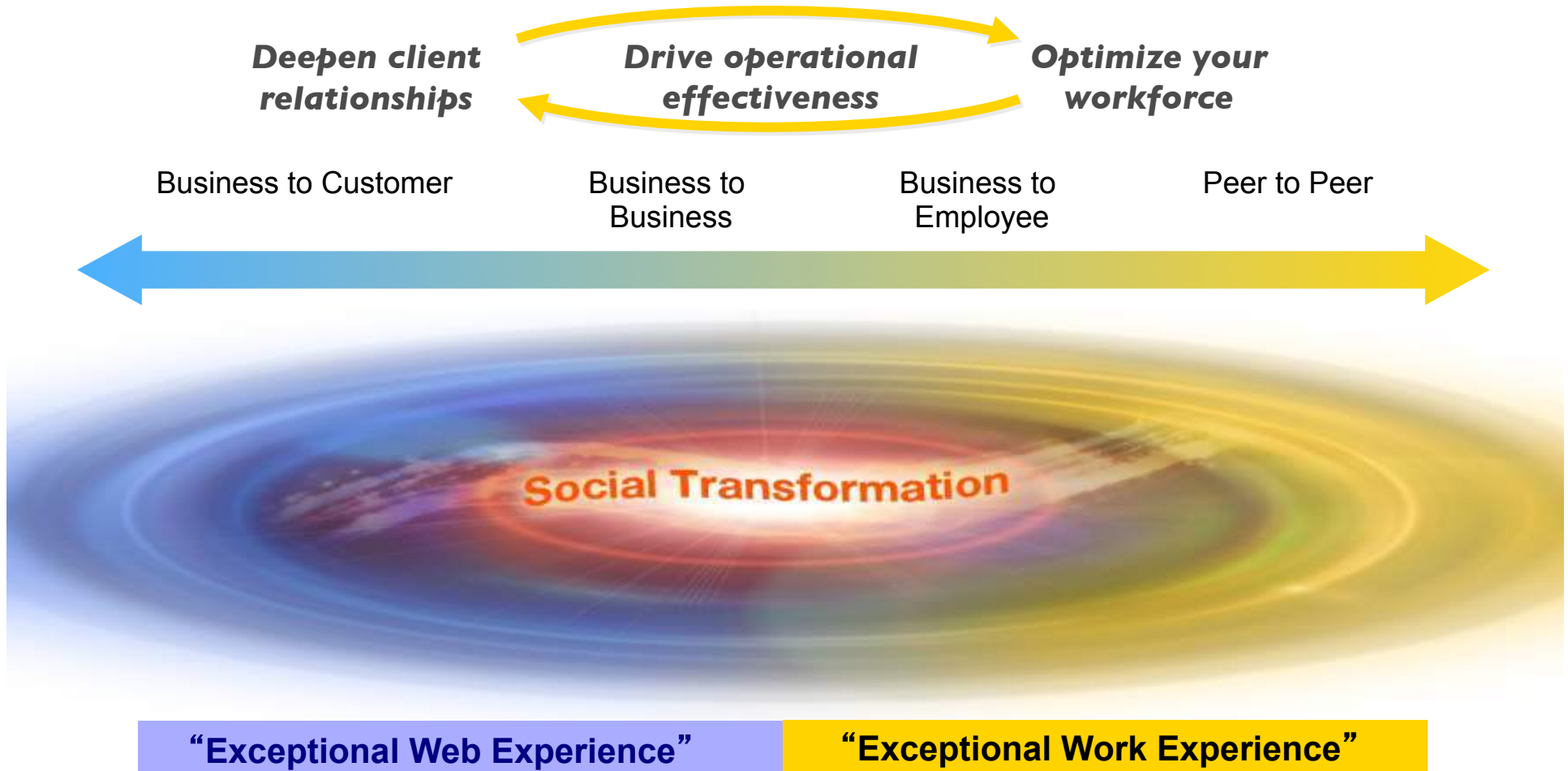
@davepeck uh oh...our last one out to  
SFO leaves in about 5 mins....could you  
fly into OAK or SJC? #sxsw

*about 19 hours ago from TweetDeck in reply to davepeck*



SouthwestAir  
Southwest Airlines

# Social Business transforms the customer and employee experience



A Social Business embraces networks of people to create business value



**ENGAGED  
TRANSPARENT  
NIMBLE**



# Social Business catalysts:

## Top Down



CEO

Cut time to market by 50%  
Wisdom of Crowds  
Most Profitable Product



Multiple Divisions

## Bottoms Up



298K Employees Managers

Sharing Knowledge  
Deliver 1m+ sales of  
single product



Subject Matter Expert

# Why should you care?

## Teams using collaboration perform better!

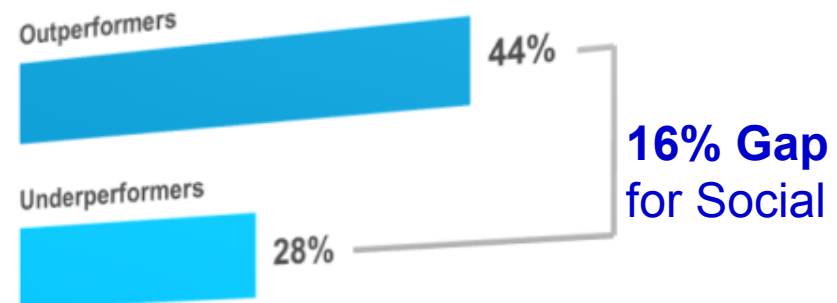
Characteristics of a  
successful Social Business

Engaging

Transparent

Nimble

Use of collaboration/social  
networking to enable global teams  
To work more effectively



Source: IBM Institute for Business Value Study 2010

Note: Outperformers are derived from an analysis of the compound annual growth rate (CAGR) for 2003-2008 EBITDA within industries. Outperformers represent companies above the median: n=203

# CMOs signaled three key imperatives

Source: IBM Institute for Business Value CMO Study 2011  
[www.ibm.com/cmstudy2011](http://www.ibm.com/cmstudy2011)



**Deliver value to  
empowered  
customers**

**Capture value,  
measure results**

**Foster lasting  
connections**

# Why IBM and SugarCRM for Social Business

- IBM delivers social solutions that connect people both *inside and outside* your company
- IBM connects social and collaborative capabilities across all business processes
- IBM and SugarCRM deliver Social Business either on-premise or in the cloud

## Target Market

- Clients looking to increase customer retention, attract new customers and maintain competitive advantage

## Advantage

- Open collaboration among employees and with *external* parties such as customers and partners

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## **Coffee Break, Review of All Speakers and Networking**

**Kay Freund**  
**15-20 minutes**



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# How Do You Integrate Social Media

**Chuck Coulson,  
VP Business Development  
SugarCRM**



# Start With the Customer



Start with  
the customer



# Put the customer at the center



**CRM**

# CRM: Enable the sales edge

INNER CORE

SALES EDGE

CUSTOMERS

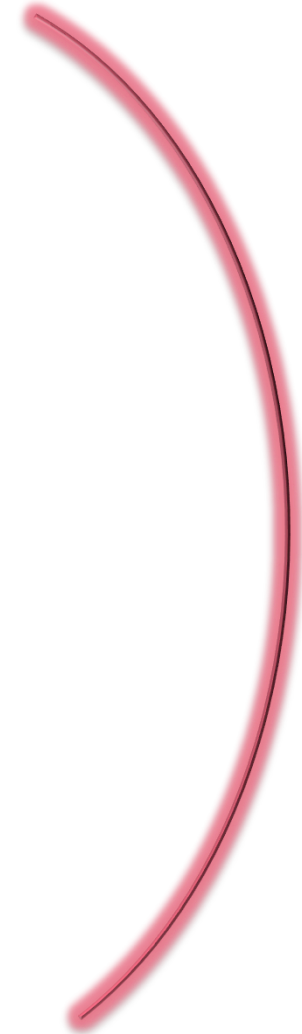


SALES

CUSTOMER  
SERVICE

CALL  
CENTER

MARKETING



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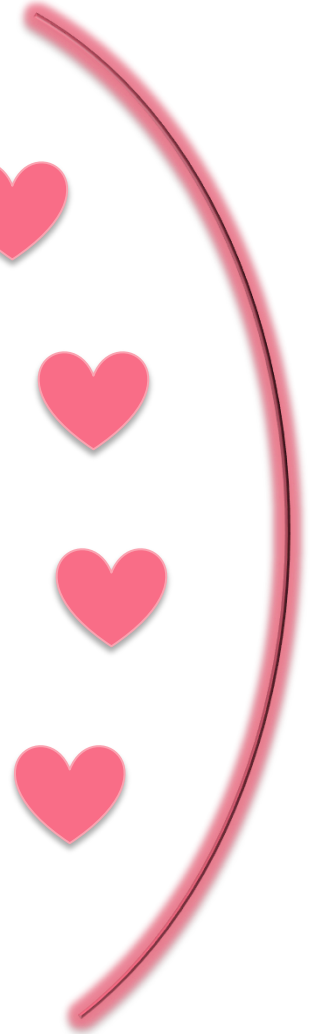
# Social CRM: Enable the customer edge

INNER CORE

SALES EDGE

PARTNERS

CUSTOMERS



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# Basics of an Open, Social CRM



# CRM Made Simple

**Intuitive**

**Open**

**Flexible**

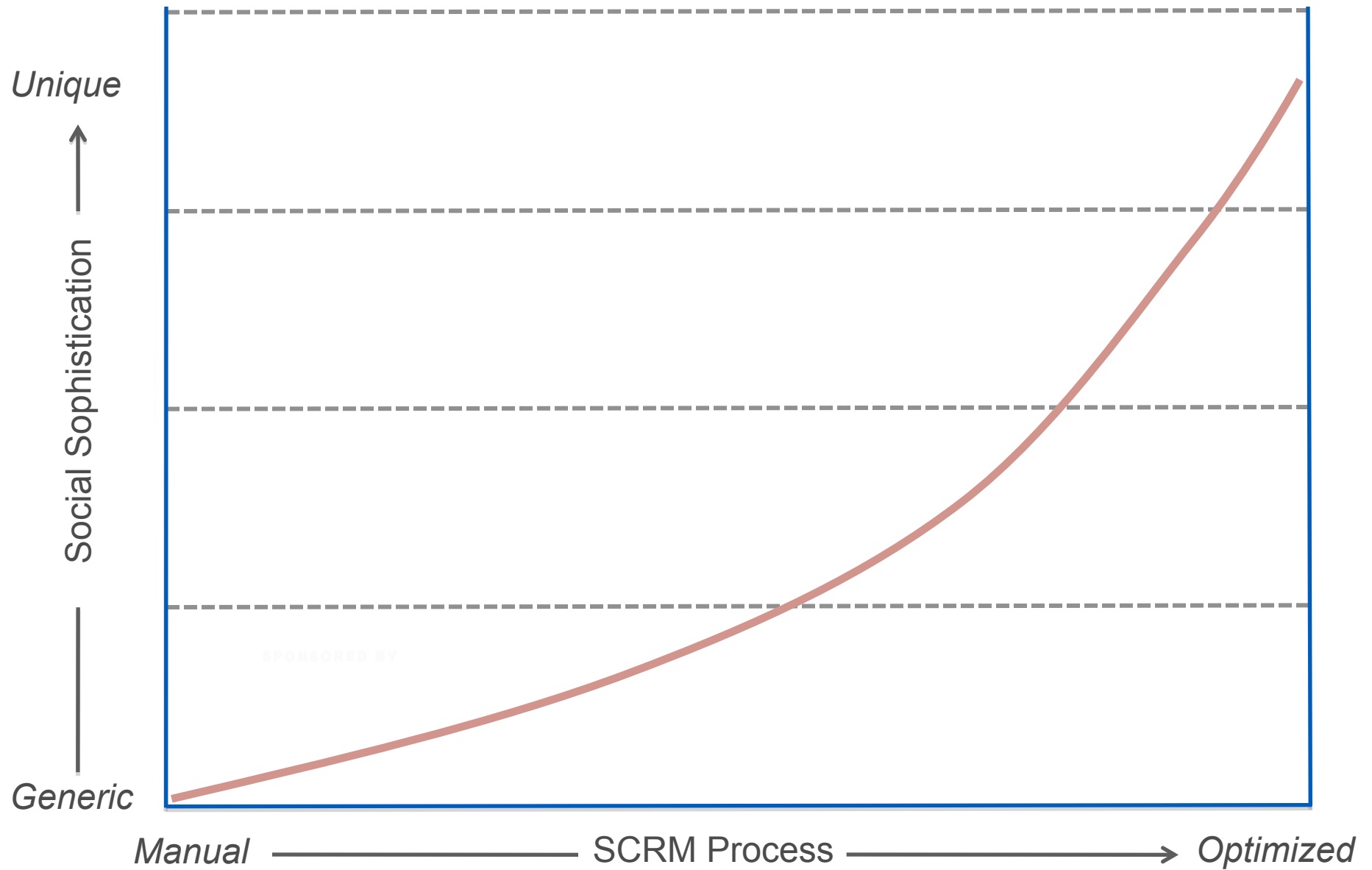
**Social CRM = Open CRM = Mobile CRM**

# Where Do You Start?

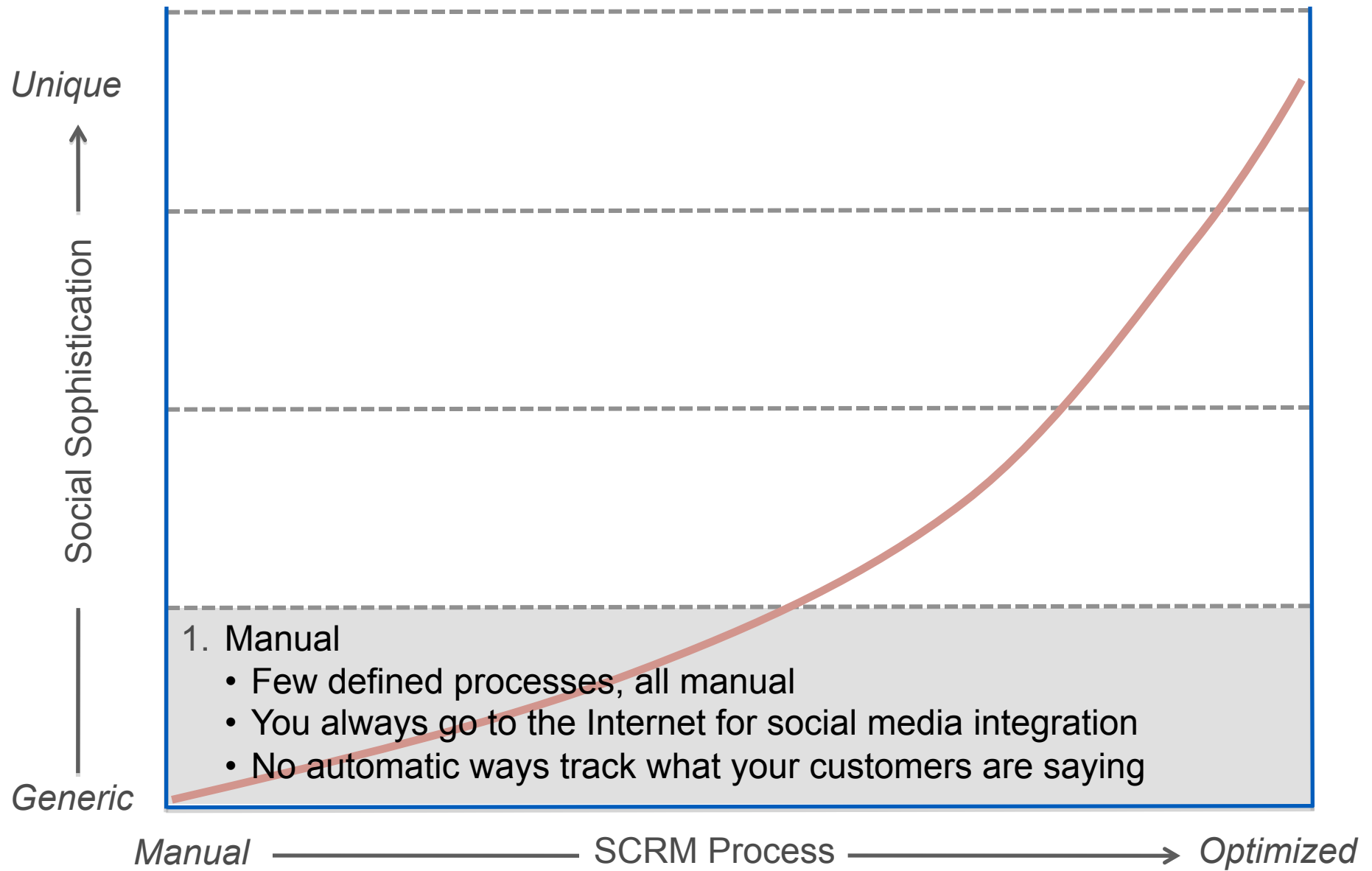


Think Big  
Start Small  
Move Fast

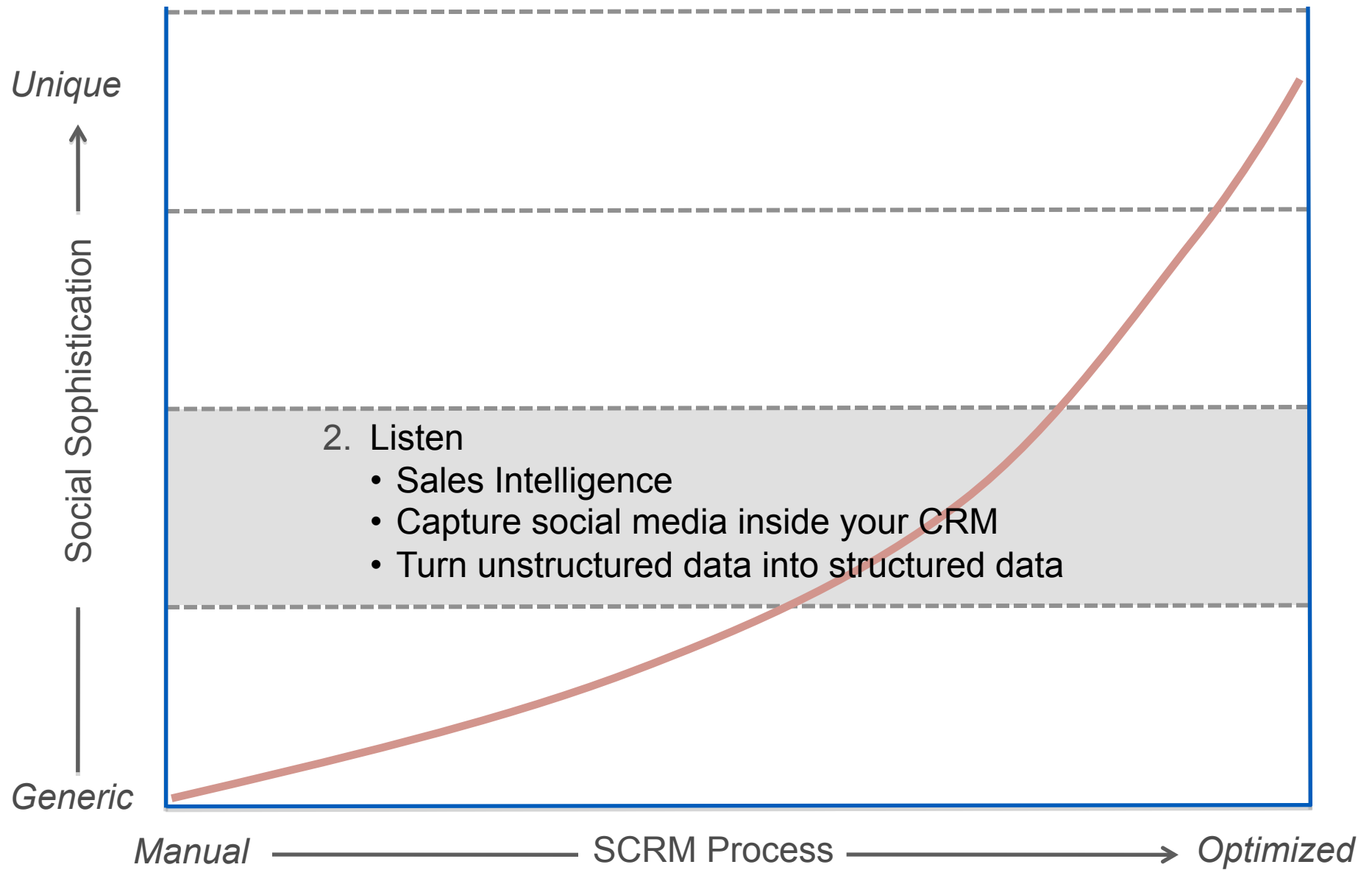
# Social CRM Adoption Curve



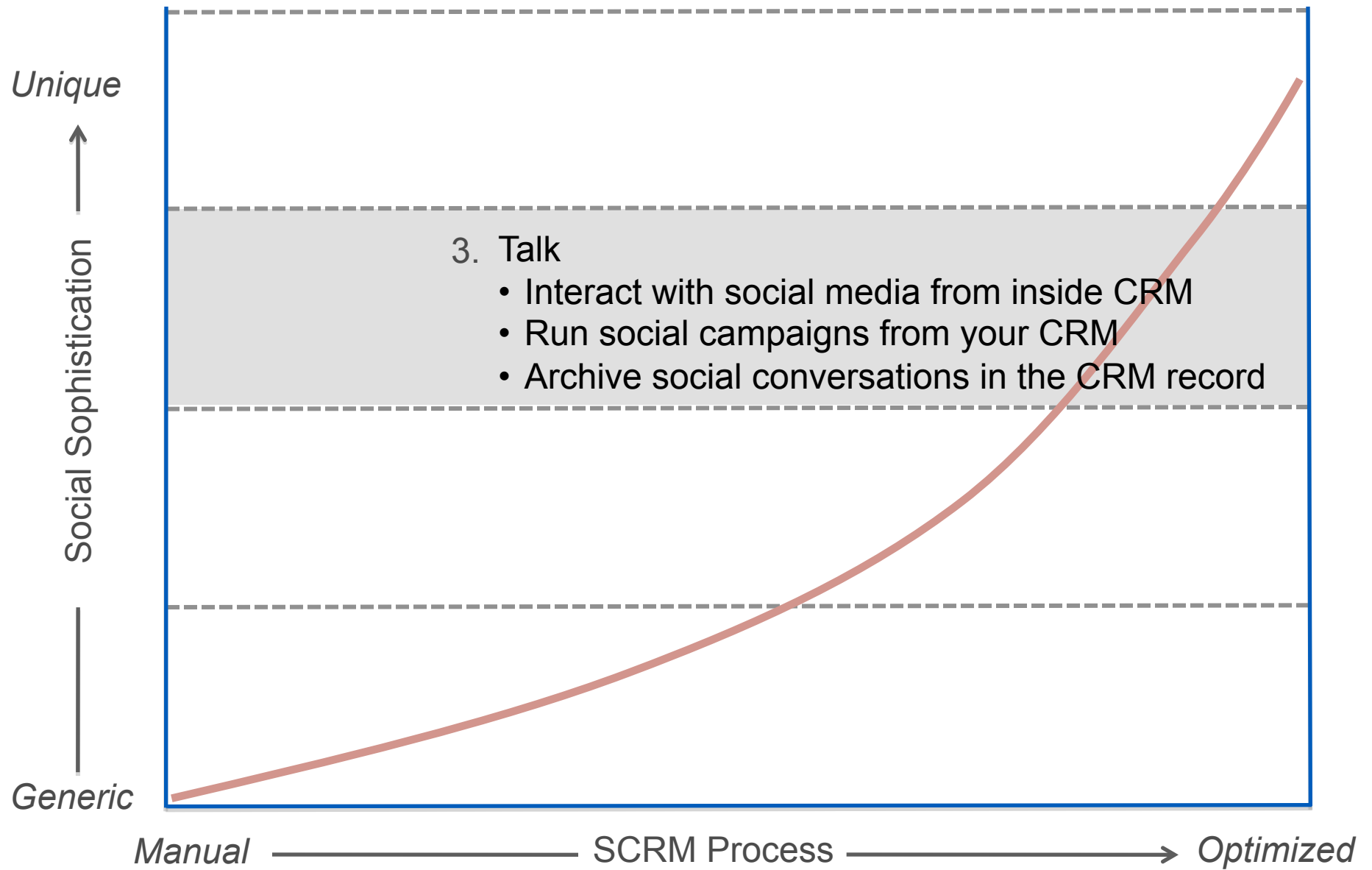
# Social CRM Adoption Curve



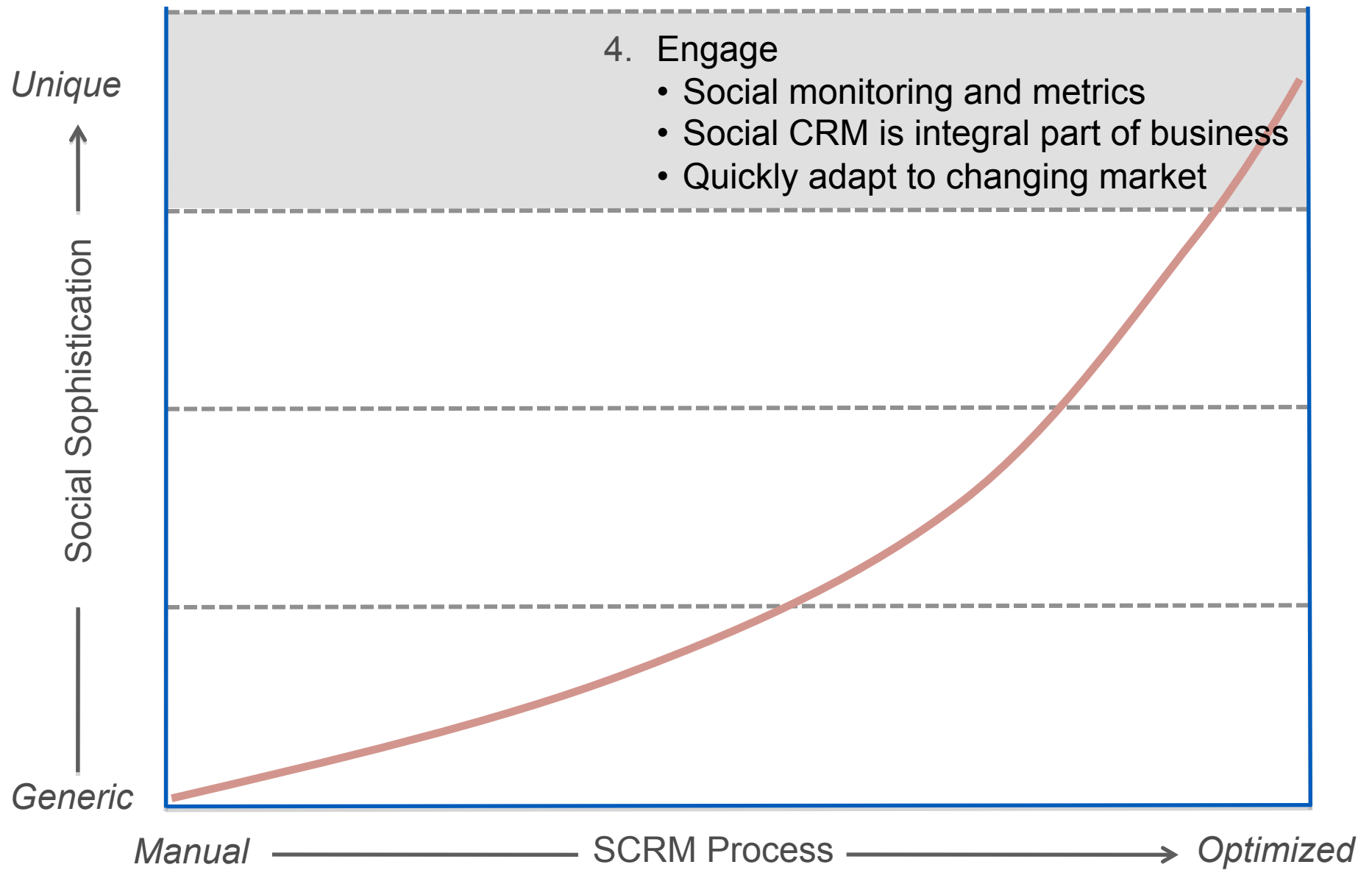
# Social CRM Adoption Curve



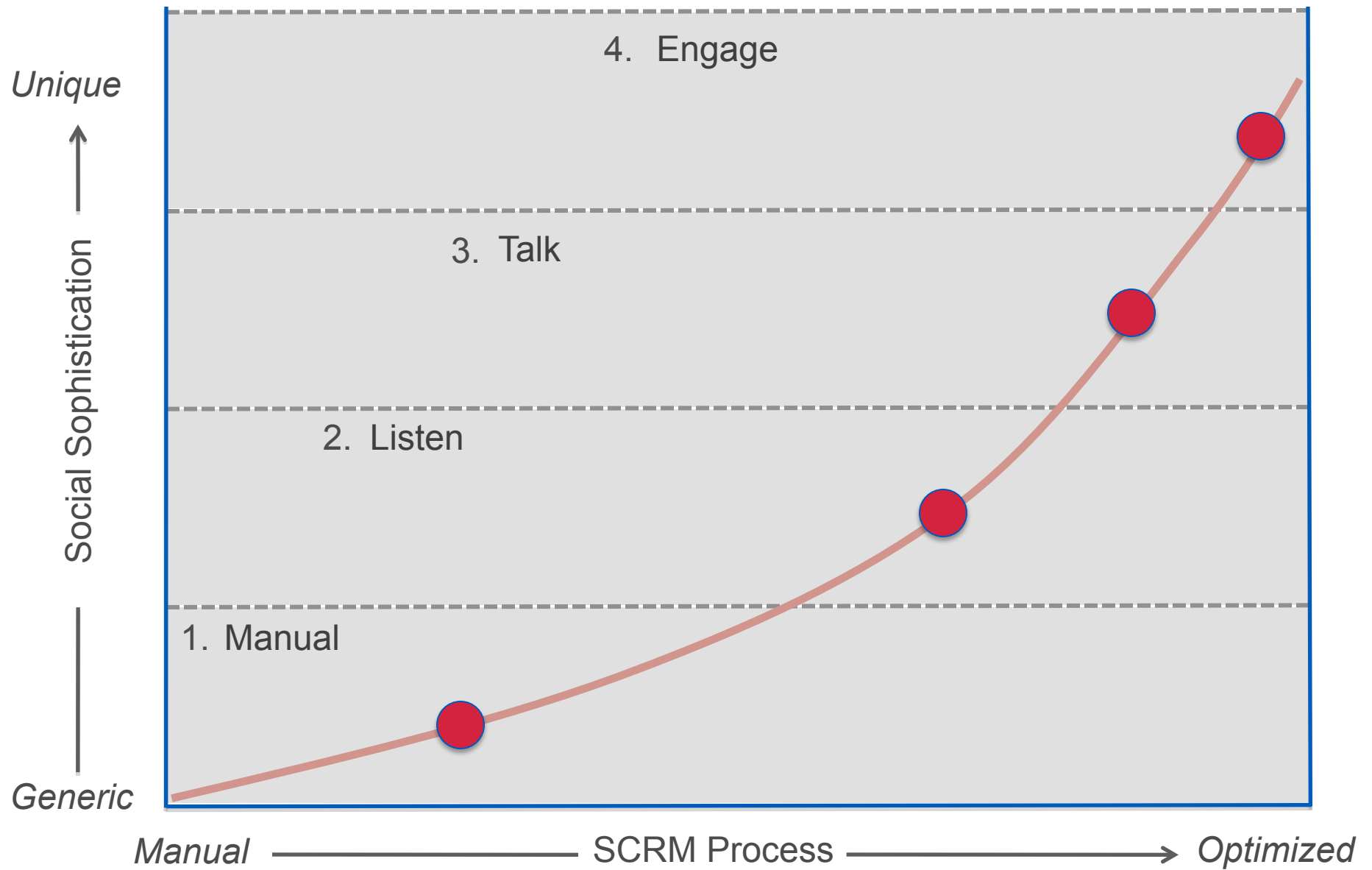
# Social CRM Adoption Curve



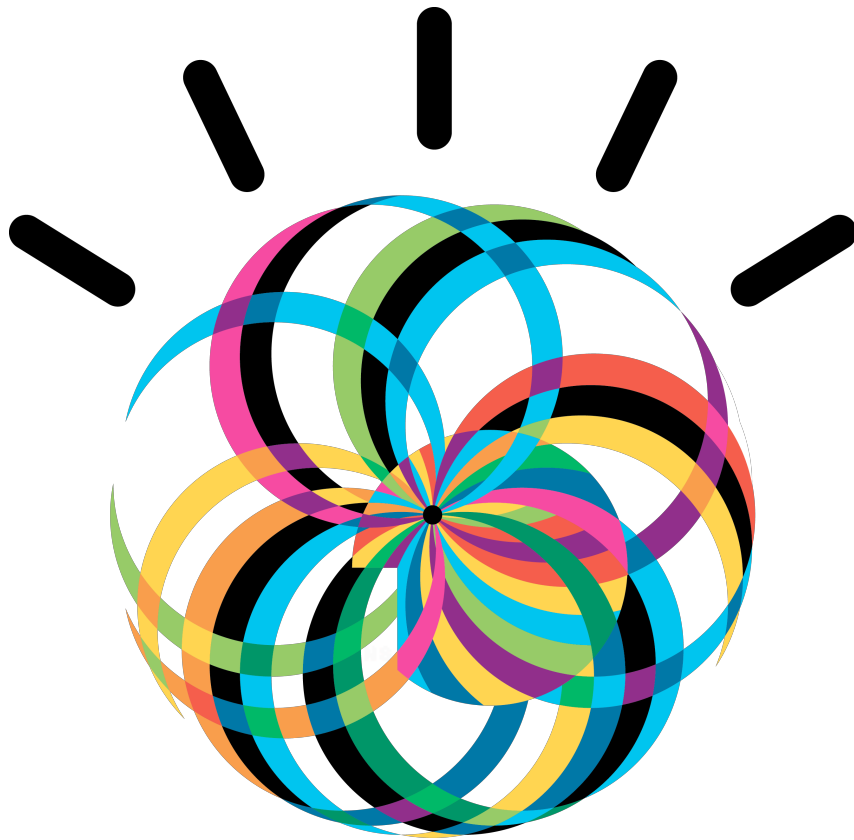
# Social CRM Adoption Curve



# Key to Social CRM is Following the Curve



# Sugar and IBM Social Media Integration



- Sugar + LotusLive
- Sugar + Lotus Notes
- Sugar + CastIron

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# Best Practices for Becoming a Social Business

**Mike Gerentine,  
VP Global Business Partners and Mid-Market,  
IBM**



# CMOs signaled three key imperatives

Source: IBM Institute for Business Value CMO Study 2011  
[www.ibm.com/cmstudy2011](http://www.ibm.com/cmstudy2011)



Imperative #2

**Deliver value to empowered customers**

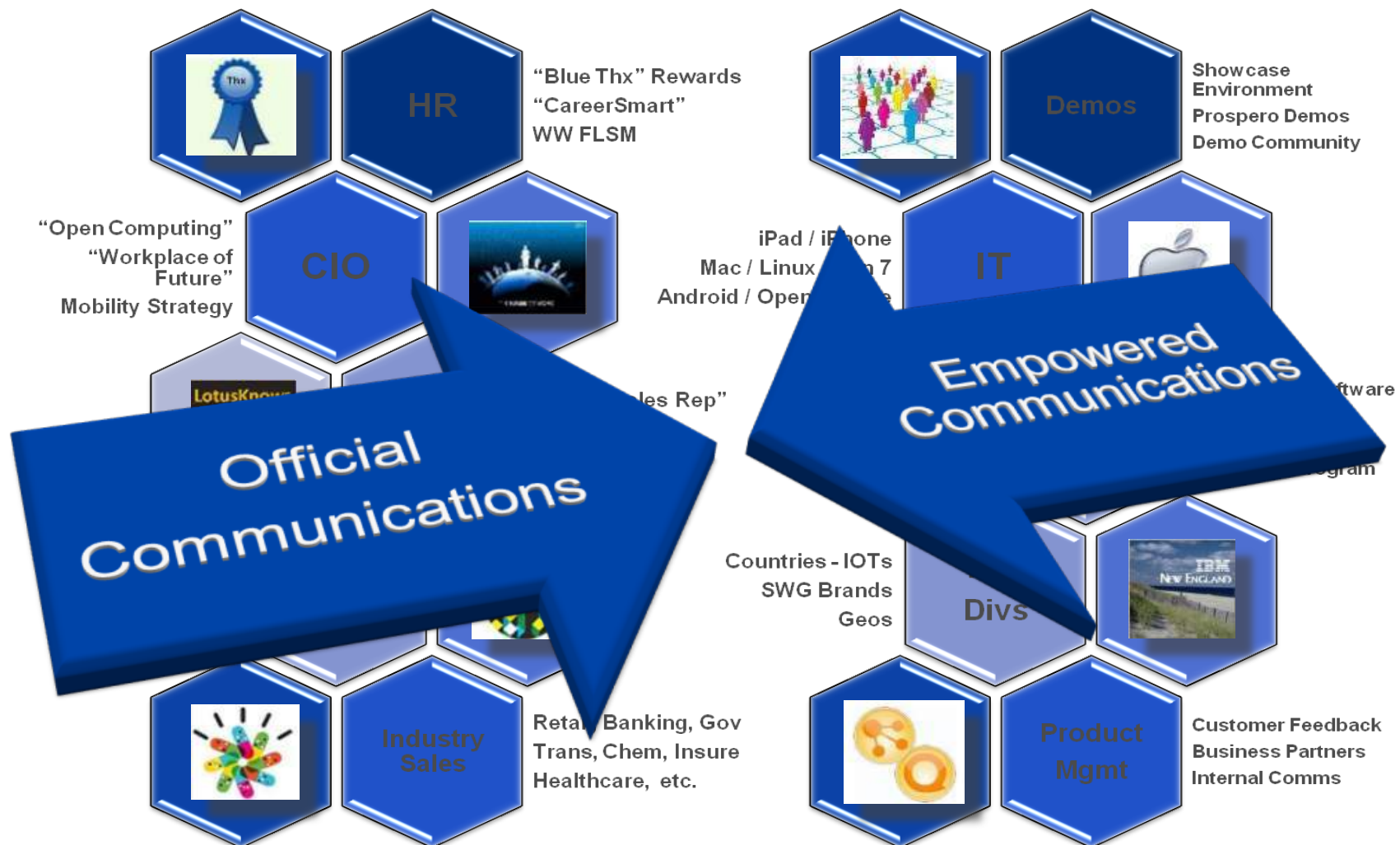
Imperative #3

**Capture value, measure results**

Imperative #1  
**Foster lasting connections**


# Imperative #1: Foster lasting connections

## Best Practice #1A: Make social real




# Example: IBM Human Resources


- Guide teams to business and professional success
- Collaborate. Develop. Build.
- Learn how to grow your career
- Drive key HR business initiatives
  - Cross Generational Diversity
  - Perspectives on Leadership
  - Building a Culture of Innovation
- Peer/manager recognition




**SWG Career Connection**  
Lauren Walker | Yesterday 7:19 AM  
[Feeds](#) | [Bookmarks](#) | [Forums](#)




**WW FLSM Manager Zone**  
WILLIAM E. SIMONDS | Friday 3:58 PM  
[Feeds](#) | [Bookmarks](#) | [Forums](#)



**BlueThx recognition users and**  
S. Laval | Friday 6:53 AM  
[Feeds](#) | [Bookmarks](#) | [Forums](#)



**Career Development @ IBM**  
SANDEEP CHANANA | Yesterday 8:43 AM  
[Feeds](#) | [Bookmarks](#) | [Forums](#)



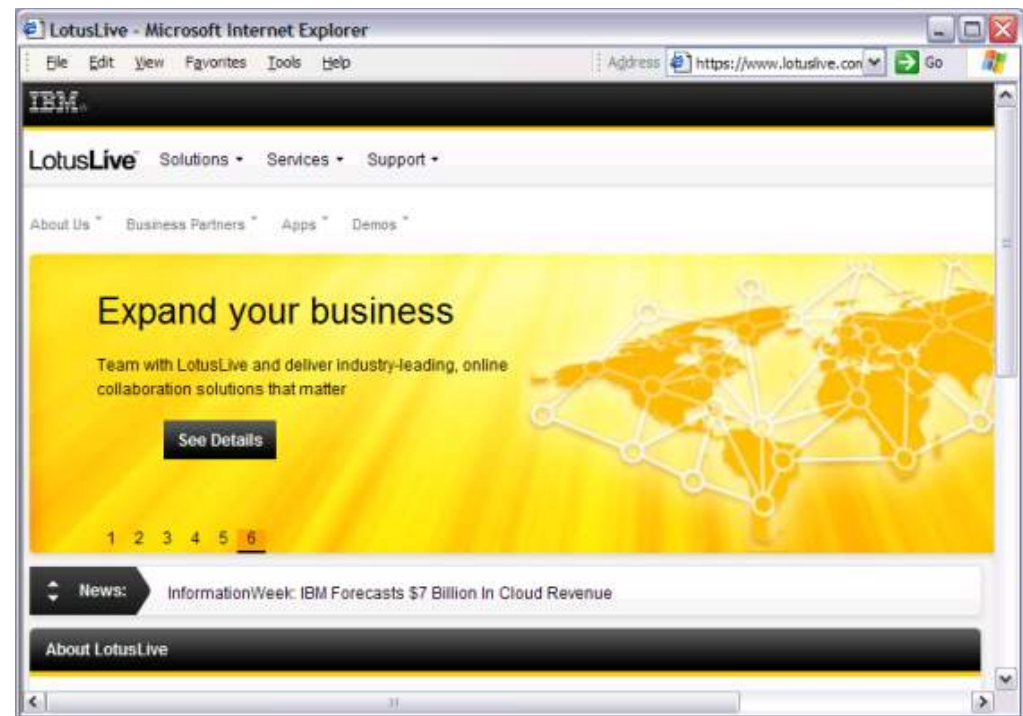
**SWG Manager Community**  
SOPHIA TSENG | Jul 28  
[Feeds](#) | [Bookmarks](#) | [Forums](#)

# Imperative #1: Foster lasting connections

## Best Practice #1B: Increase business collaboration

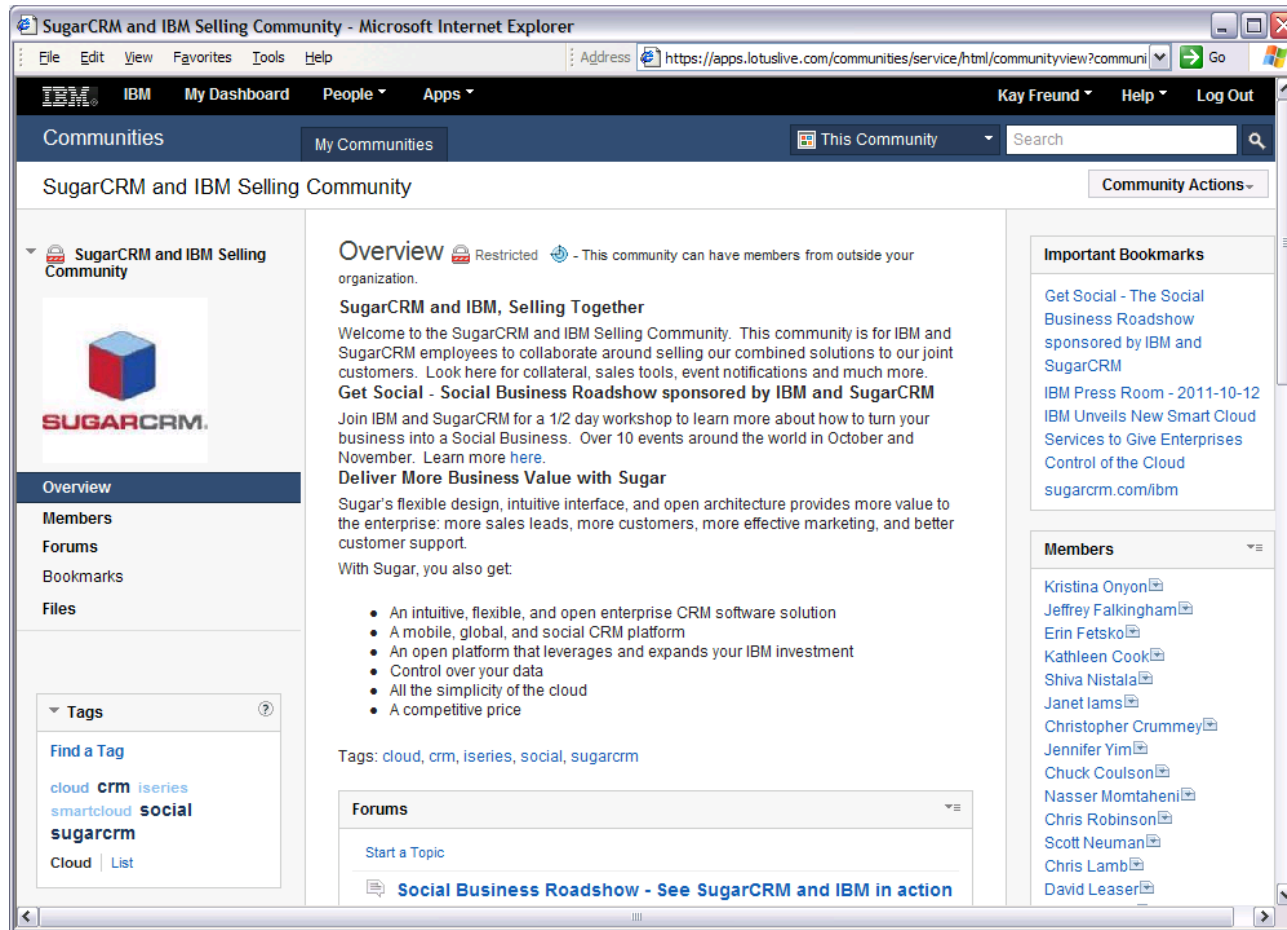
Example: Online collaboration within your business and beyond

- Optimize your workforce with faster access to people and information
- Deepen client relationships
- Sales, marketing, and support teams engage more efficiently, resulting in shorter sales cycles, increased customer satisfaction and loyalty



**\*\* Start now with 4Q LotusLive special 50% off \*\***

# Example: Team Sales Community



# Business value for IBM

- Expertise Location
- #1 "Aha" Moment
- 635K profiles
- 459% adoption

## Expertise Location



- Global Portal
- Role Based Delivery
- Social & Mobile
- "2<sup>nd</sup> Trust Source"

## Experience



- Crowdsourcing
- Internal & External
- Prioritize features
- 3-4 months faster to market
- Technology Adoption Program

## Innovation



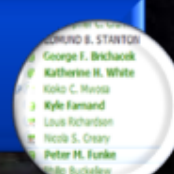
- Digital Reputation
- SME & Natural Champions
- 22K Blogs
- 179% adoption

## Digital Reputation



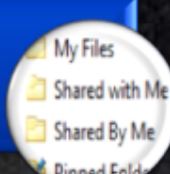
- Real Time Collaboration
- 50M IMs per day
- 2x every 3 years

## Real Time



- Social Knowledge Transfer
- Social File Sharing
- 5.6 Petabytes
- 287% adoption

## Wisdom of Crowds

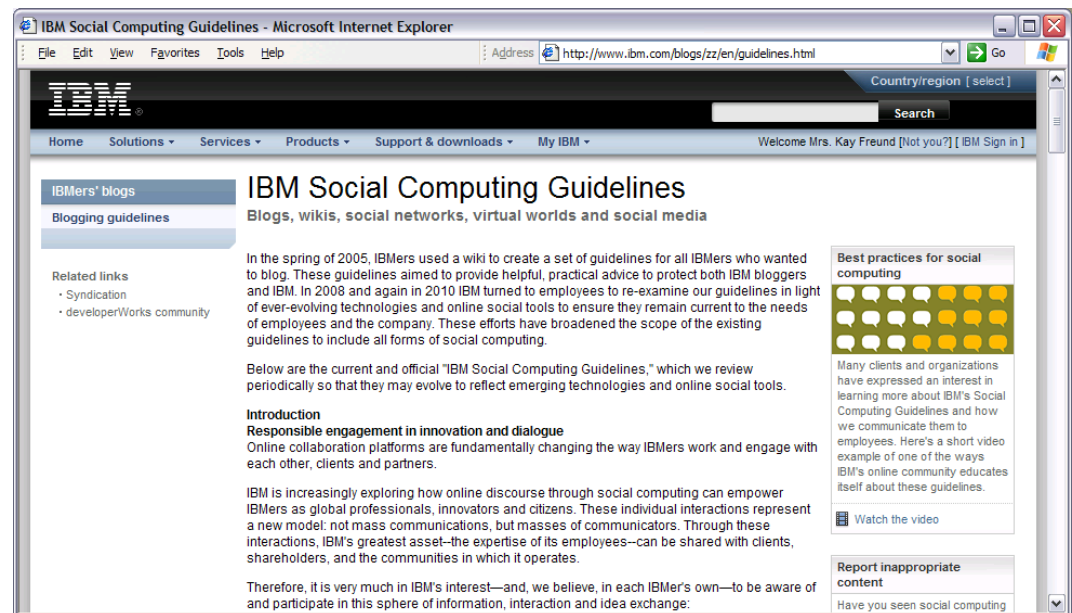


# Imperative #2: Deliver value to empowered customers

## Best Practice #2A: Be social within guidelines

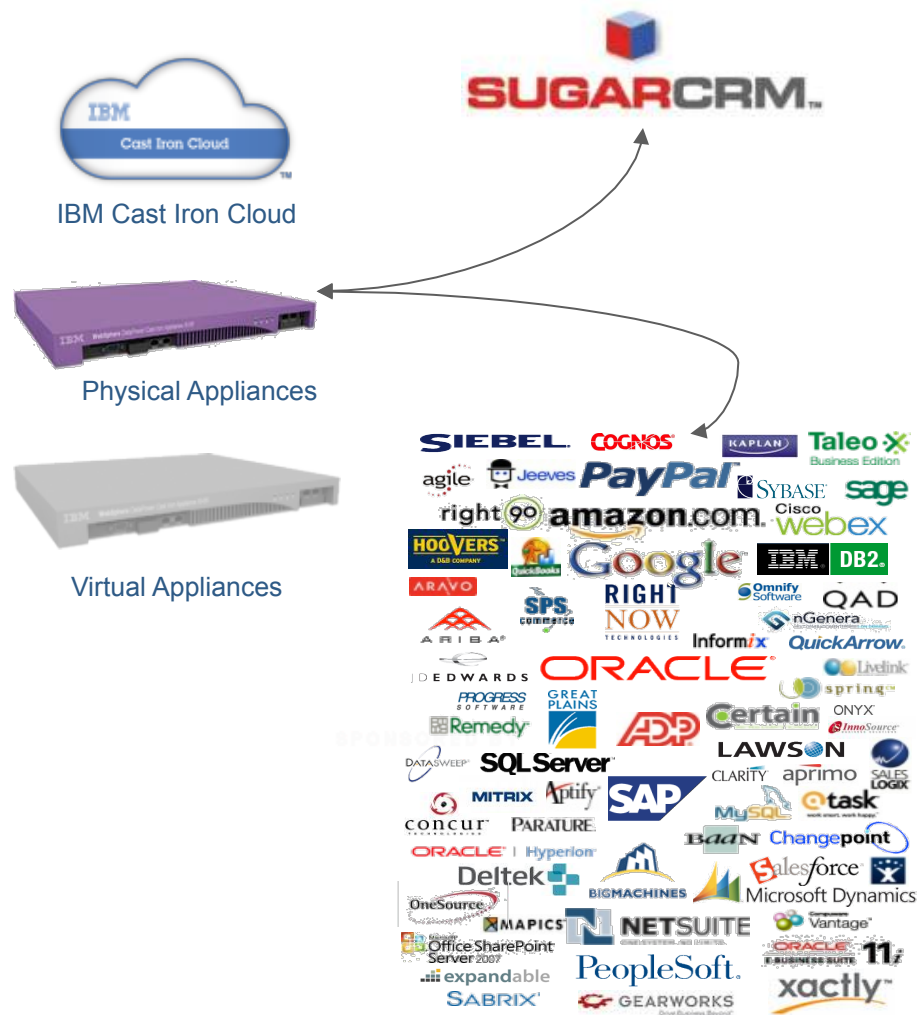
Example: IBM Social Computing Guidelines

- Follow IBM Business Conduct Guidelines
- Identify yourself
- Foster open dialogue and exchange of ideas
- Provide value



# Imperative #2: Deliver value to empowered customers

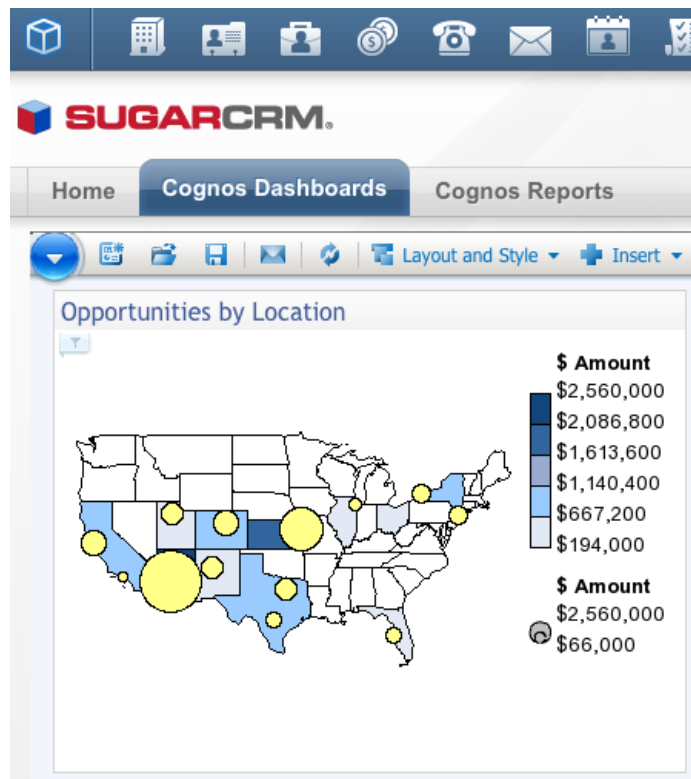
## Best Practice #2B: Give customers what they want



- Synchronize key business data
- Find and use business data during sales process
  - Configurable templates to get you started in days
  - Deploy securely in the cloud or on-premise for maximum flexibility
  - Combine Sugar with WebSphere Cast Iron on Cloud or on-site

# Imperative #3: Capture value, measure results

## Best Practice #3A: Apply analytics and optimize



- Combine Sugar data with other data sources and report across sources with Cognos
- View current and historical data about customers side-by-side
- Choose the right customers and prospects to target with your marketing campaigns by using SPSS Direct Marketing
- Maximize ROI of marketing campaigns

# Imperative #3: Capture value, measure results

## Best Practice #3B: Manage costs of deployment



- Flexibility enables deployment on cloud and/or on-premise
- Sugar on IBM SmartCloud Enterprise

### [SugarCRM Harnesses the Power of IBM SmartCloud](#)

Destination CRM - 10 hours ago

According to Halsey, **SugarCRM** has also worked with other **cloud** services providers, like Microsoft and Amazon, but he found that "IBM offers a lot of ...

[IBM launches platform-as-a-service effort, beefs up cloud focus](#) - ZDNet (blog)

[IBM Raises the Bar to Meet Burgeoning Cloud Demand in the Channel](#) - PR Newswire (press release)

[Cloud Computing: IBM Fluffs Its Cloud](#) - SYS-CON Media (press release)

[Business Intelligence Middle East \(press release\)](#) - Cloud Pro

[all 136 news articles »](#)

- Leverage cloud with enterprise grade security and SLAs
- Optimized experience on IBM Systems i, x, and p with proven scaling on POWER7 processor
- IBM delivers the premier server platform for SugarCRM solutions

# IBM and SugarCRM



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- Connect with your company and beyond
- Take simple steps to increase value provided - now
- Methodically grow your sales and marketing results
- For more info:
  - [ibm.com/socialbusiness](http://ibm.com/socialbusiness)
  - [www.sugarcrm.com/ibm](http://www.sugarcrm.com/ibm)
  - Follow #IBMSocialBiz
  - Like [facebook.com/MidmarketIBM](https://facebook.com/MidmarketIBM)



**SUGARCRM.**



**SUGARCRM.**



# Overview



#IBMSocialBiz #sugarcrm

- Customer Testimonials
- The New Rules of Social CRM (*Sugar*)
- From Social Media to Social CRM (*IBM*)  
---- Coffee break -----
- How Do You Integrate Social Media (*Sugar*)
- Best Practices for Becoming a Social Business (*IBM*)
- A Day in the Life of the Social Business

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#IBMSocialBiz #sugarcrm

# ***A Day in the Life of a Social Business***

**Bill Harrison**  
**CEO, Epicom**



# SOCIAL CRM

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

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# 360 Degree View of the Customer

## Traditional CRM Activities

- Customer Support
- Marketing
- Sales

## External data sources

- ERP
- Billings
- HR



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## Social Media Networks

- Facebook
- Twitter
- LinkedIn

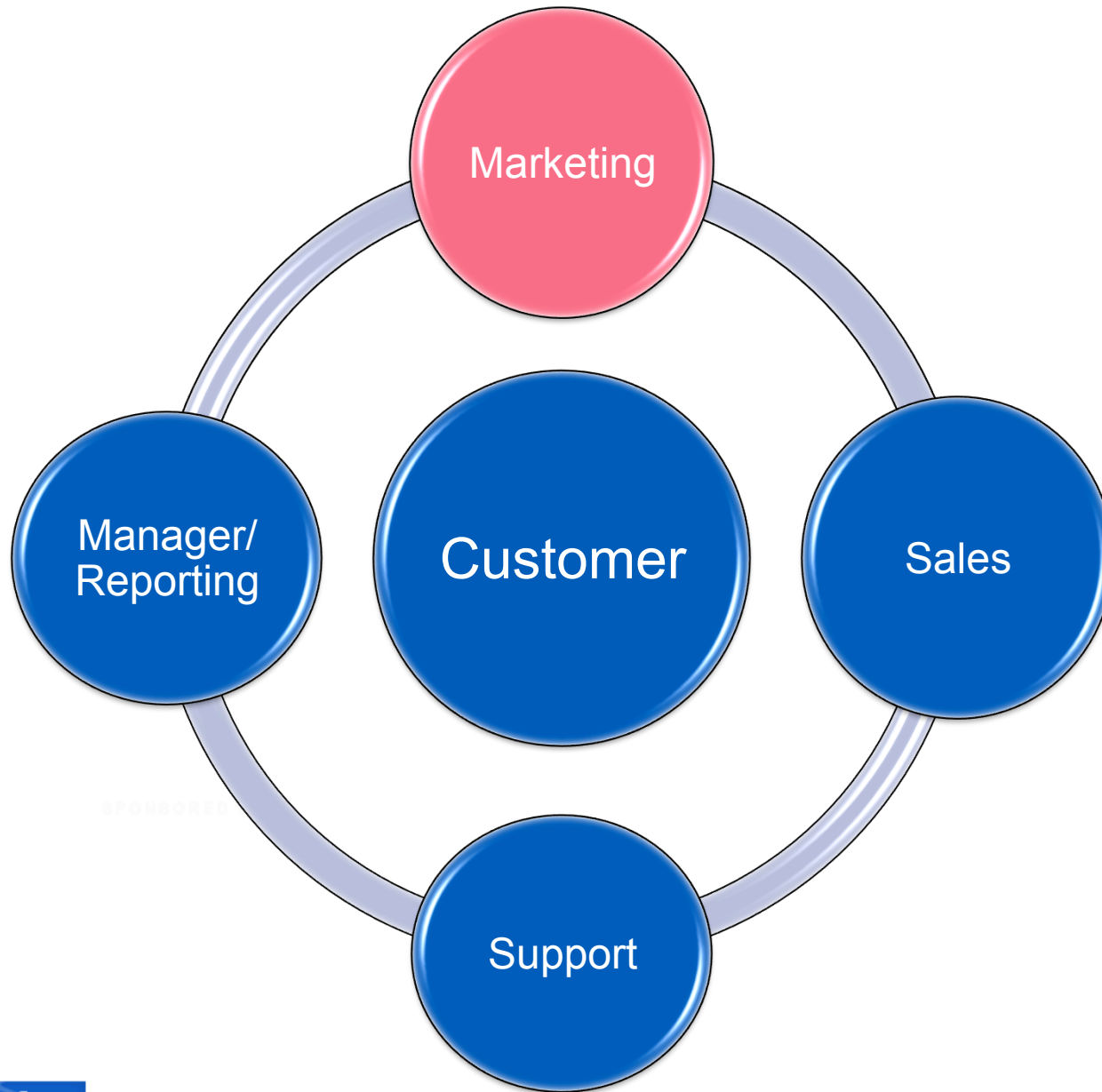
# You will see Social CRM in Action:

- **Flexible** with easily configuration around processes
- **Intuitive** and easy for ends users to use & configure
- **Open** and integrated with IBM and 3rd applications
- **Global** and available in 25 languages
- **Mobile** with access from any smartphone and tablet
- **Social** with activity streams and built-in integrations

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# Marketing Creates a Campaign



# A Prospect Responds



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# Sales Works the Lead



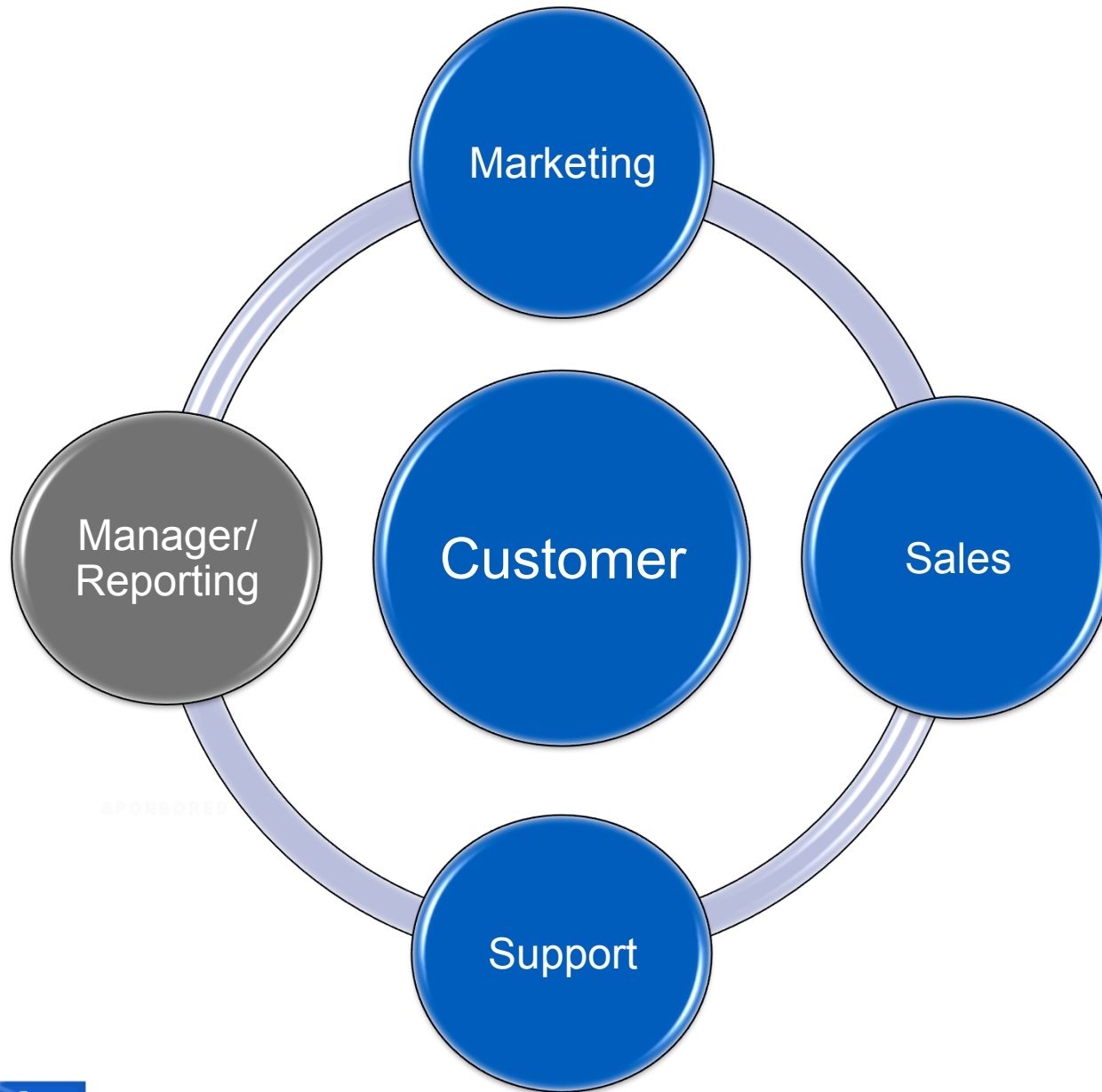
SPONSORED

# Sales and the Prospect Interact Socially



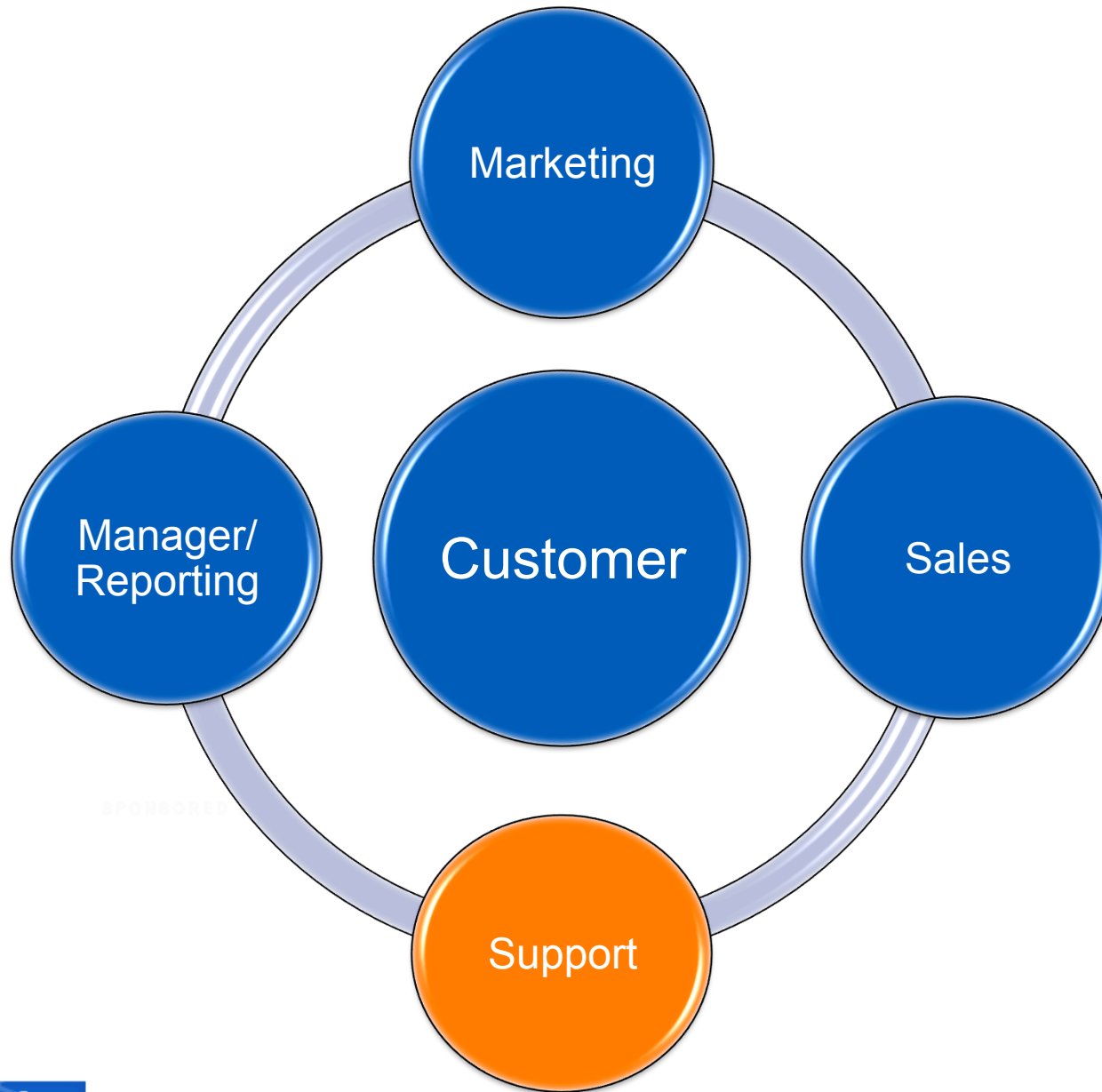
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# Management Views the Forecast



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# Warm Handoff to Customer Support

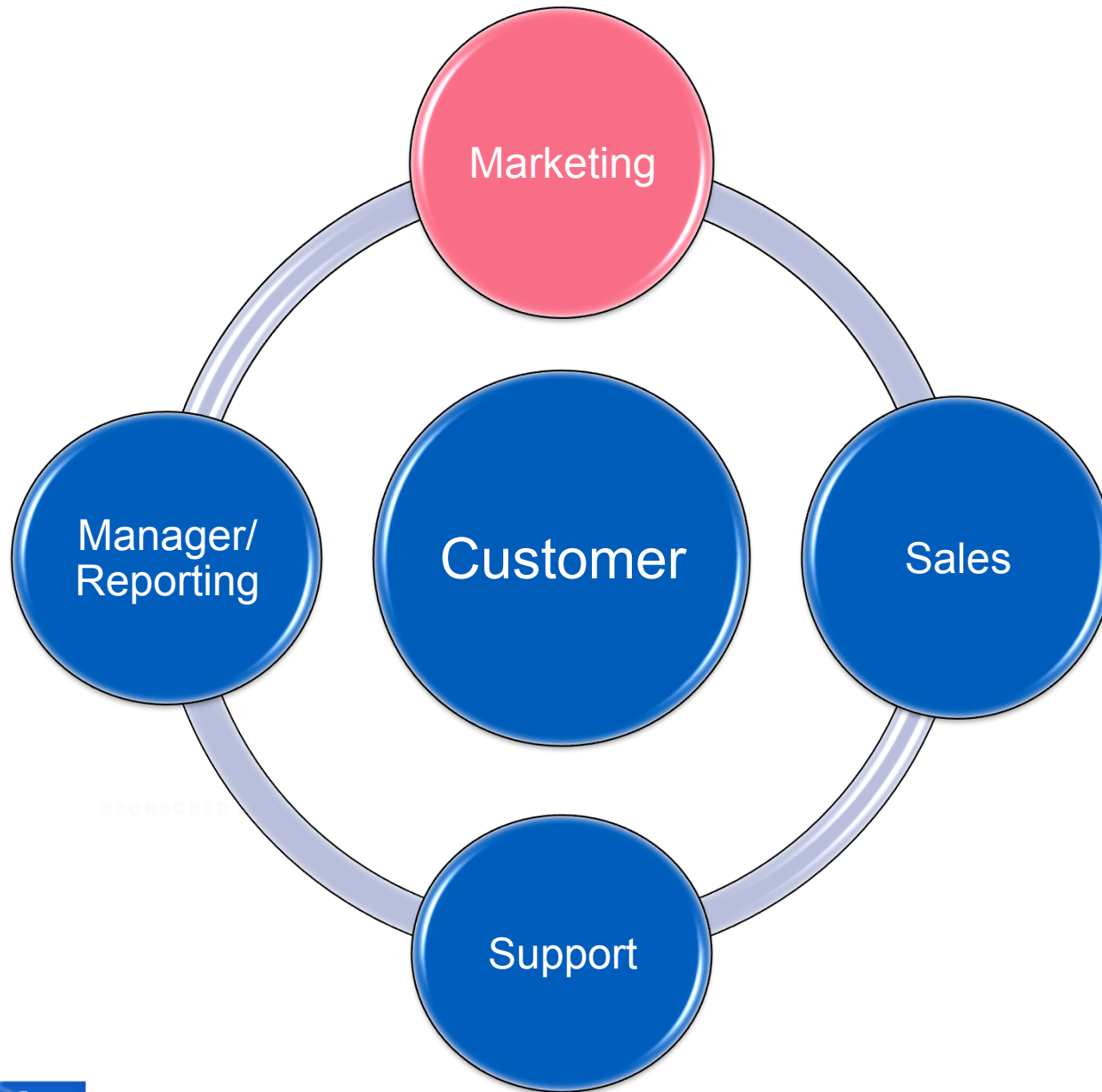


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# The Customer Opens a Support Ticket



# Marketing Reviews the Campaign's ROI



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# The Social Business

## SugarCRM


- About SugarCRM
- Features
- News
- The Community
- Contact Us
- Customer Support

### Main Menu

- » Home
- » Company
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- » FAQ
- » The News
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### Resources


- » SugarCRM
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- » SugarCRM
  - » Forums
- » SugarCRM Help
- » CRM Home




Jane Fitzpatrick  
Campaigns Marketing



Will Westin  
Account Manager



Regina Lazlow  
Customer Service Representative



Jim Brennan  
VP Sales

# The Customer



Allergy | Technology | Health Care Providers | Research | Patients

Scientific advances have made it possible to solve a crime from a spot of blood or strand of hair. Similarly, a micro sample of blood contains the biomarkers necessary to diagnose disease.



ImmuneTech is applying complex technology to simplify the diagnostic process, making it accessible & affordable to all patients.

The company's first product is a test for *allergy*.



Tomi Fujimura,  
Director Marketing  
ImmuneTech

# In This Demo, You Will Observe:

- Marketing
  - Campaigns
  - ROI
  - Web to lead capture form
- Sales
  - Sales funnel flow
  - Social and mobile CRM integration
  - Business process integration
  - Pipeline reporting
- Management reporting
  - Business intelligence
- Support
  - Handoff from sales to support
  - Case management



## Jane Fitzpatrick, Marketing Manager

- Jane is the Marketing Manager
- Her job is “to make the phones ring”
- She uses Sugar to manage all her campaigns
- She has personalized Sugar for her needs
- The most recent campaign is a Mobile CRM campaign

# Social Media to Generate Leads

LinkedIn  Account Type: Basic

Home Profile Contacts Groups Jobs Inbox 3 Companies News More

Groups ▾



CRM Experts

Discussions

Members

Promotions

Jobs

Search

More...



Follow Chris

Mobilise your business or mobilose your business

Chris@velocityweb.co.uk



Mobile Research Conference 2011 London

mobileresearchconference.com

The Mobile Research Conference is an industry event entirely dedicated to mobile surveys, connecting scientific research and best corporate practice.

5 months ago

 Like

 Comment

 Follow

 Flag

More ▾



Welcome to

**SUGAR ENTERPRISE.**

Please enter your user name and password.

User Name:

Password:

Language:



Log In



Server response time: 0.82 seconds.

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# Marketing Automation in Sugar



- Campaign management
- Web to lead capture
- Email marketing
- ROI measurement



## Tomi Fujimura, ImmuneTech

- Tomi is an existing lead in the lead nurturing program

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From: Jane Fitzpatrick [marketing@sugarcrm.com]      Sent: Thu 8/20/2011 9:21 AM  
To: Tomi Fujimura  
Cc:  
Subject: Sugar Mobile Plus



Dear Tomi,

According to a recent analyst survey, by the end of this year, companies that capitalize on the widespread adoption of smartphones by more than 50% of field sales people, will gain 20% more value from sales automation initiatives than companies who don't.

Sugar is making it easy for you to see these gains with [Sugar Mobile Plus](#).

Take advantage of the following:

- **Access Anywhere, Anytime** – Access your customer data anytime from your BlackBerry, iPad, or iPhone whether or not you are connected to the Internet.
- **Security** – Your data is encrypted and can be wiped remotely
- **Integration** – Sugar syncs with your email, contacts, calendar and tasks on your mobile device
- **Log Calls and Emails** – Log incoming and outgoing calls and email directly to Sugar

Add Mobile to Sugar today and save 25%.

[Learn more](#) and contact your sales representative today.



## **Will Westin, Account Manager**

- Will is an expert in Mobile CRM
- Will is assigned to the ImmuneTech account
- Will uses Sugar, InsideView and LotusLive
- Will is an big sports fan who never misses a game of his home team
- Will stays connected using his BlackBerry smartphone

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Welcome to


**SUGAR ENTERPRISE.**

Please enter your user name and password.

User Name:

Password:

Language:

English (US) 

Log In



Server response time: 0.82 seconds.

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# Flexible, Intuitive and Open

- Flexible

- Sugar fits around the company's processes
- Workflow automates repetitive tasks

- Intuitive

- Easy to personalize and configure
- Simple web 2.0 interface

- Open

- Integrates with other business applications
- Open business integration framework

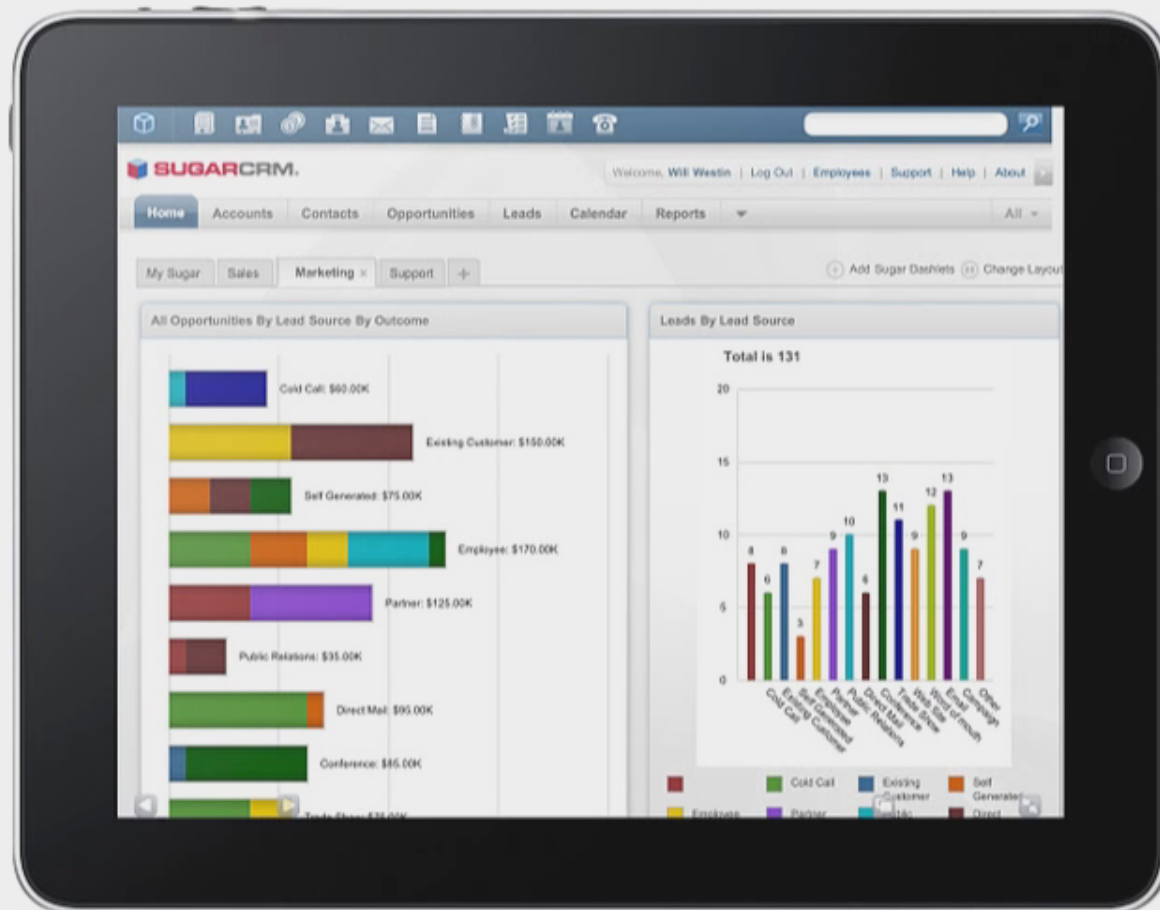
# Mobile and Social

- Mobile

- Native application for 90% of all smartphones (Android, Blackberry, iPhone/iPad)
- Mobile browser solution for all other

- Social

- External Collaboration: LotusLive, WebEx, Google Docs, GoToMeeting, Box.net, KnowledgeTree and Sharepoint
- Sales Intelligence: InsideView, Hoovers, Jigsaw
- Email integration: Sugar Plug-in for Outlook & Lotus Notes
- Social: Activity Streams, LinkedIn, Twitter and Facebook



# Sales Automation in Sugar



- Customize sales stages
- Team selling
- Forecasting
- Products, quotes, contracts
- Sales process automation
- Mobile and social CRM



## Jim Brennan, VP Sales

- Jim runs the sales organization
- Jim is a numbers guy, reporting and a good understand of the state of the business are key
- Jim uses Sugar reporting and Cognos Business Intelligence
- Jim needs access to all this data on his iPad2

iPad

4:07 PM

100%

Home » SugarCRM - Commercial Open Source CRM



roadshow.sugarondemand.com/social\_business\_roadshow/day-in-t...

Google



Welcome to

**SUGAR** ENTERPRISE.

Please enter your user name and password.

User Name:

Password:

Language:

**Log In**

Server response time: 1.46 seconds.

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## **Regina Lazlow**

### **Customer Service Representative**

- Regina uses Sugar in French
- She is the Support Rep on the ImmuneTech account
- Her customers communicate with her through email, phone and the customer self-service portal
- She uses Lotus Notes

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Bienvenue sur  
**SUGAR** ENTERPRISE.

Merci de vous authentifier.

Login:

Mot de passe:

Langue:  ▼

Login

Temps de réponse du serveur: 0.21 secondes.

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## Tomi Fujimura, ImmuneTech

- Tomi has a support problem which she enters via the customer portal

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# SugarCRM

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- » News Feeds

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- » SugarCRM Forums
- » SugarCRM Help
- » OSM Home
- » Administrator

## Welcome to SugarCRM

[Home](#)[Cases](#)[Bug Tracker](#)[Newsletters](#)[Knowledge Base](#)[FAQ](#)

User Name:

Password:

[New user? Please register](#)

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POWERED BY  
**SUGARCRM**

# Customer Service in Sugar



- Support cases
- Bug tracking
- Email management
- Knowledge base
- Customer self-service portal



## Jane Fitzpatrick, Marketing Manager

- Jane checks how successful the campaign was by comparing its Return on Investment (ROI) to other campaigns

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» Mobile CRM

Create

Edit Duplicate Delete Send Test Send Emails Mail Merge View Change Log

Launch Wizard View Status View ROI

Campaign Overview

Name:	Mobile CRM	Status:	Active
Start Date:	03/31/2010	Type:	Email
End Date:	04/07/2010		
Impressions:	457		
Budget: (USD \$):	23,500.00	Expected Cost: (USD \$):	23,500.00
Actual Cost: (USD \$):	23,500.00	Expected Revenue: (USD \$):	70,000.00
Objective:	Lead Cultivation and Conversion		
Description:	An e-mail newsletter designed to inform prospects about the new Mobile CRM offering		

Other

Assigned to:	jane	Date Modified:	08/03/2011 23:37 by jane
Teams:	Global	Date Created:	04/01/2010 23:15 by jane

All Marketing Other

Target List

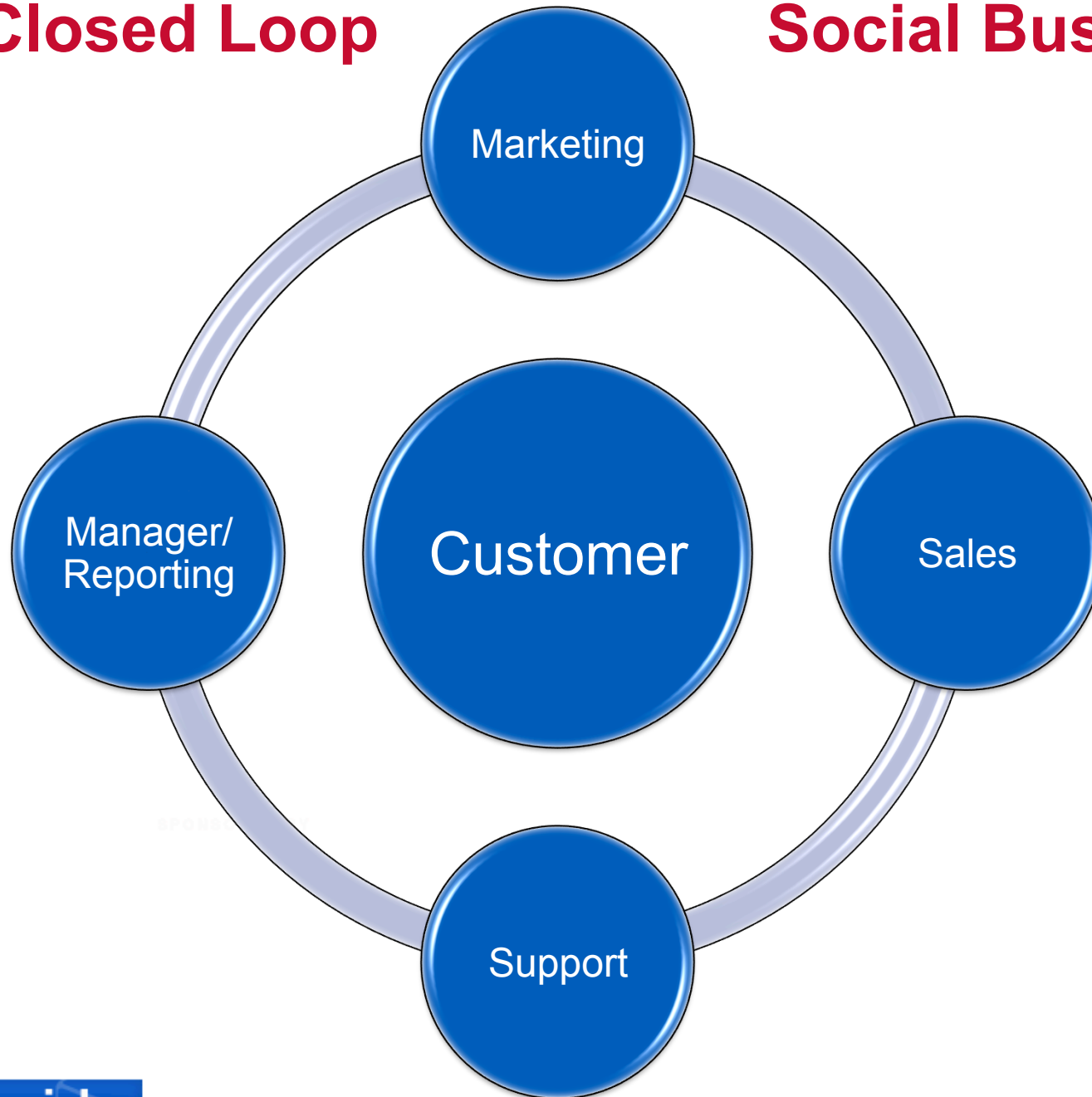
Create	Select	(1 - 3 of 3)	
Target List	Description	Type	Targets in List
Mobile Campaign New Lead List		Default	414 edit rem
Mobile CRM Lead Nurturing List		Default	159 edit rem
Opt-outs		Suppression List - By Id	7 edit rem

Tracker URLs

Create	(1 - 2 of 2)
--------	--------------

**Closed Loop**

**Social Business**



# The Future of Business is Open



# You Saw How Sugar Is

- **Flexible** with easily configuration around processes
- **Intuitive** and easy for ends users to use & configure
- **Open** and integrated with IBM and 3rd applications
- **Global** and available in 25 languages
- **Mobile** with access from any smartphone and tablet
- **Social** with activity streams and built-in integrations

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# Your Next Step: Join The Conversation



@IBMSocialBiz  
@sugarcrm



[www.facebook.com/sugarcrm](http://www.facebook.com/sugarcrm)

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Tell us how we did and sign up for a free trial

[www.sugarcrm.com/crm/content/social-business-roadshow-recap](http://www.sugarcrm.com/crm/content/social-business-roadshow-recap)

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

# Questions and Answers

