

# Get Social

The Social Business Roadshow

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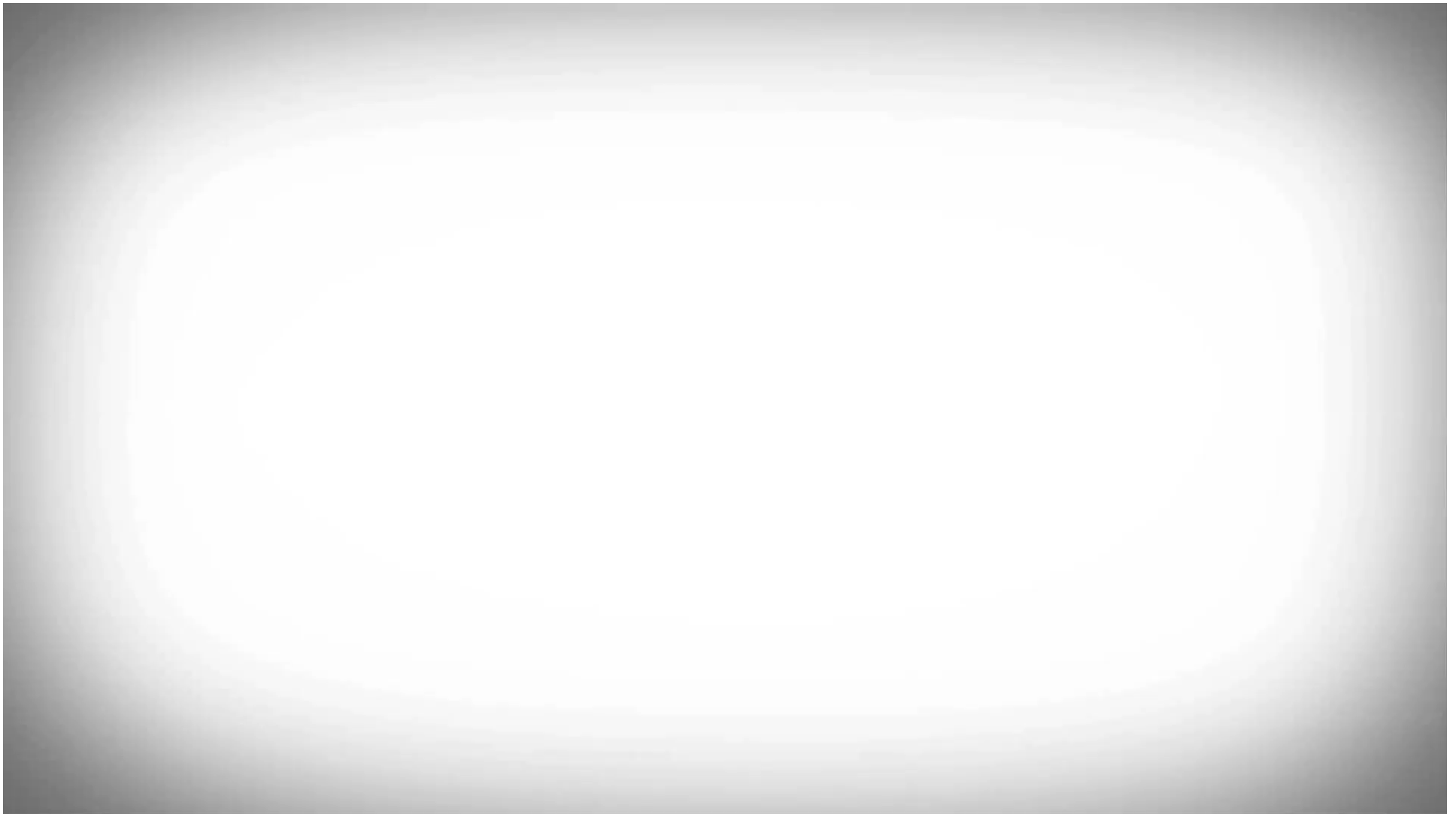


# **Welcome and Intro Video**

**Erin Fetsko, Principle Sales Engineer, SugarCRM**







# **Introductions**

**Erin Fetsko, Principle Sales Engineer, SugarCRM**



# Agenda

- 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

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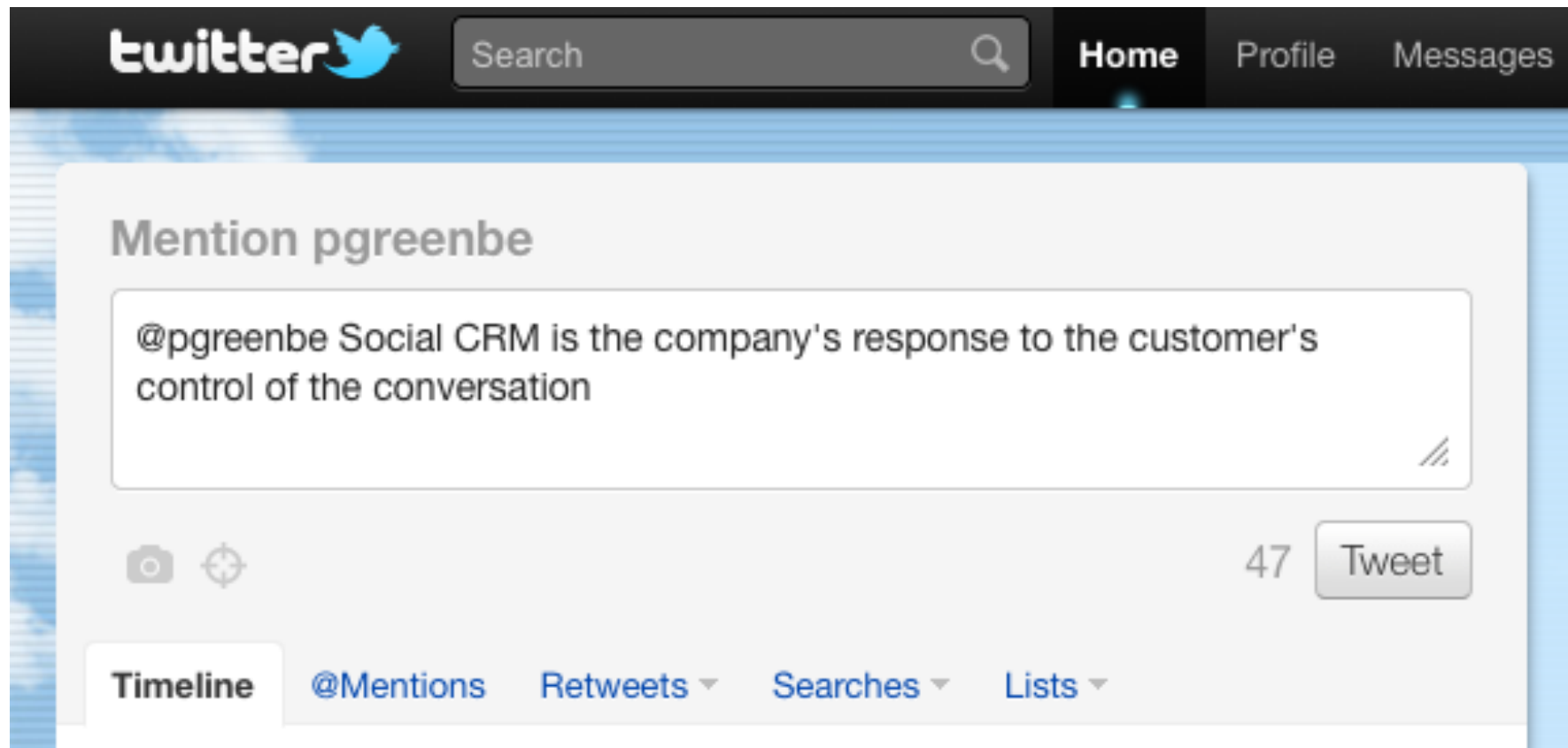
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# Social CRM Is...



# ***Empowering A.M. Castle's Sales Methodology Using SugarCRM***



**Castle Metals®**

**Jon Berbaum**

**Client Engagement Manager**

**Highland Solutions**

# About A.M. Castle

- Headquartered in Oak Brook.
- 55 locations throughout North America, Europe and Asia.
- Founded in 1980.
- Foremost global distributor of specialty grade, high performance metals.
- \$1B Company, 300 person sales team.



# Key Issues



- Lack of visibility into customer intelligence.
- Fragmented contact information.
- Manual forecasting & call reports.
- New sales methodology.

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# Why SugarCRM



## Why did you choose SugarCRM?

- Rapid deployment, near-instant ROI.
- Flexibility.
- Cloud-based, mobile friendly, Outlook integration.
- OnDemand and SmartCloud delivery.

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# Highland Solutions

## Company Facts

- 100% successful CRM implementation rate
- 90% of our clients engage us in multiple projects
- Broad expertise in business-specific web applications: CRM, E-Commerce, Fully Custom, Systems Integration
- Experienced in SugarCRM implementation and support for national and global companies
- SugarCRM Gold Partner
- Founded in 1998



## Buzz

“ We regularly bring “impossible” requirements to Highland and **they deliver.** ”



--Director of Marketing, North America & Europe

“ The Highland team is excellent. They are **producing fundamental shifts** in our business. ”



--President & CEO

# The Process



- Proof of Concept in August
  - Analysis & customization complete within 5 days.
  - Targeted data migration.
  - Multi-step training.
  - Integration with Outlook, LinkedIn and InsideView.
- Initial rollout (30%) in October
  - Migration to IBM SmartCloud.
  - Advanced reporting.
  - Forecasting workflow.
  - Quote tracking & follow-up.
- Phase 2
  - Enterprise wide rollout
  - ERP integration using IBM WebSphere Cast Iron.

# SugarCRM at A.M. Castle



- 80 users (field sales & inside sales). Full sales deployment is 300+.
- Used primarily for:
  - Sales prep & strategy.
  - Call debriefing & training.
  - Forecasting & reporting.
- User adoption is 100%.
  - Baked in sales methodology.
  - Makes life easier: email, mobile, social.

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# Benefits



- Improved visibility into sales.
- Better coordination between inside and field sales.
- Reduced overhead.
- Reduced risk from turnover.
- Faster reporting process.
- Specific ROI to come. Expected impact in:
  - Increased Quote win rate.
  - Revenue lift (more time to sell, enforced methodology).
  - Faster time to revenue for new sales rep onboarding.

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# Best Practices



## Lessons Learned

- Clearly define the goals, limit the scope.
- Get buy-in at every user level.
- Use a Proof of Concept to validate or disqualify a potential solution.
- Have a realistic data strategy.

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# Thank you!



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Client Engagement Manager  
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[www.highlandsolutions.com](http://www.highlandsolutions.com)

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--President & CEO



# **Customer Success Story**

**Sheldon Good Company**





# Sheldon Good

- Real Estate Auctions
- Commercial & residential
- New York based
- Regional offices: Chicago, Miami, San Francisco and more
- Founded in 1965
- Leader using technology



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# Choosing a CRM

- SaaS model
- Pricing
- Deploy quickly
- Customize quickly



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# Tracking Phone Leads



## Issue

- High call volume
- Time constraint with leads

## Solution

- Quickly create a new record
- Cleans duplicates on the backend



# Tracking Web Leads

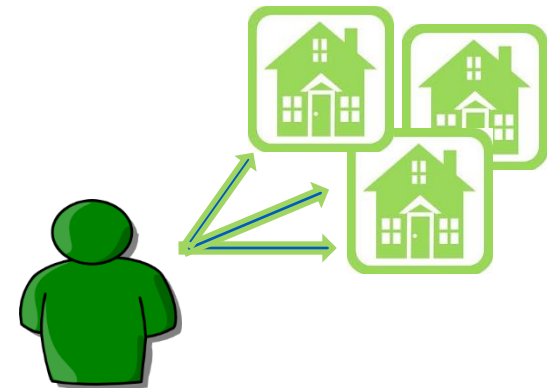


## Issue

- High volume of emails leads
- Multiple 'Records of Interest' need to be created

## Solution

- Creates contact records
- Create multiple property records
- Cleans duplicates on the backend



# Managing Properties



Prospect

Property

Bids

Sold



# Automation

- Automates leads from inbound emails
  - Creates records
  - Creates follow-up activities
  - Sends out emails
- Keeps the database clean by checking and fixing duplicates



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# Objectives Met

- True tracking of leads and properties
- Increased reporting and pipeline
- Real-time view into ad dollars
- Ability to reroute marketing dollars
- Target out reach very specifically



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# SOLD!

- Great return on investment
- Was able to drive a couple million dollars of sales in a very short period of time

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# **The New Rules of Social CRM**

**Clint Oram, co-founder and CTO, 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

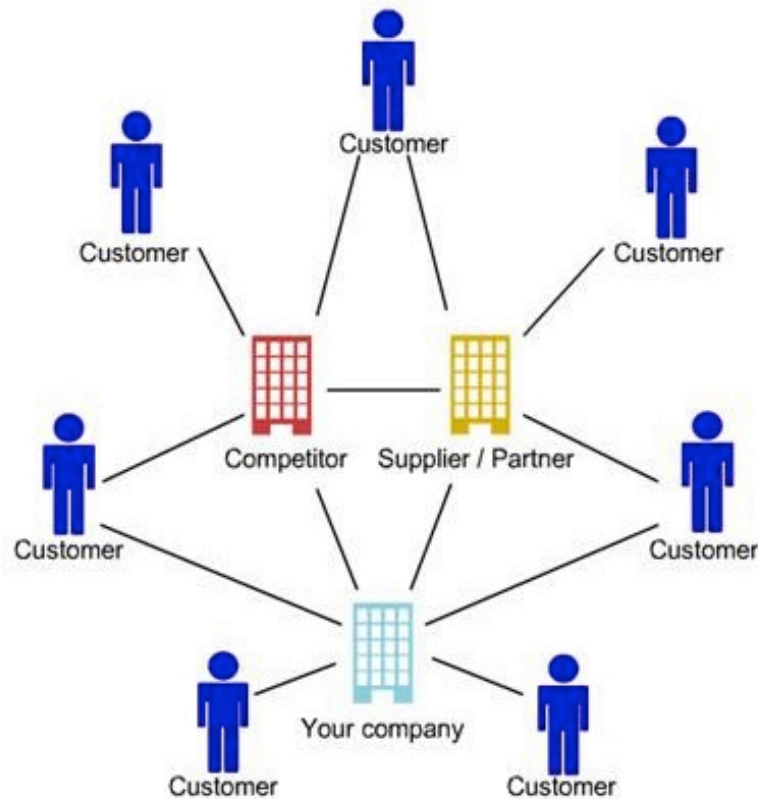
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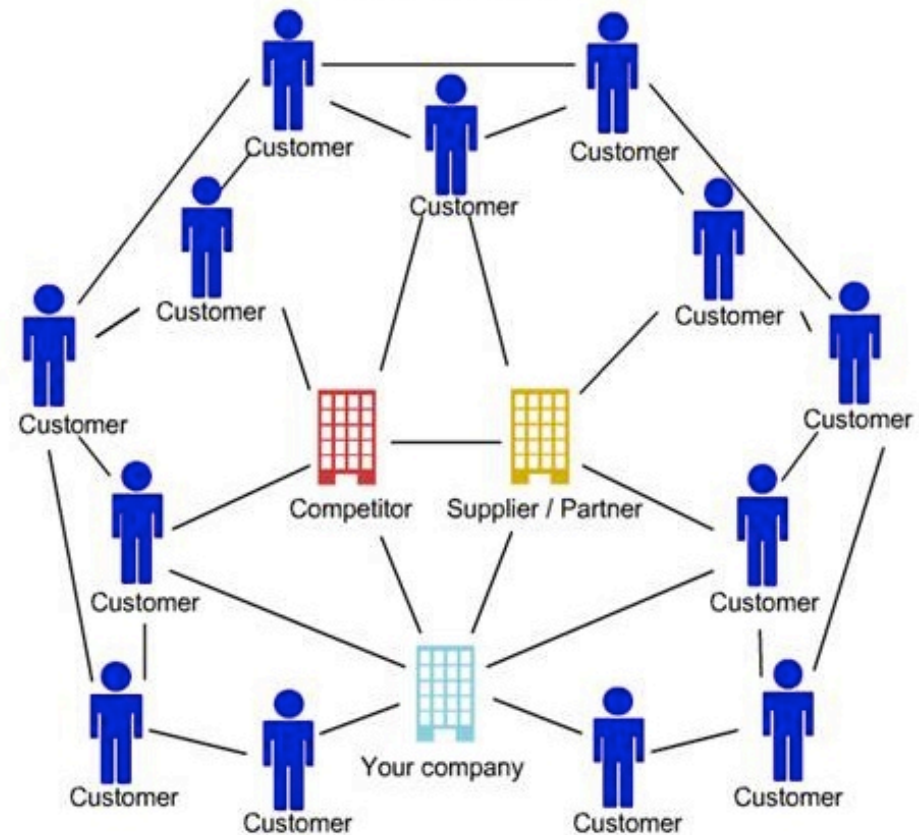


# Change: Customers Believe Customers Not Companies!

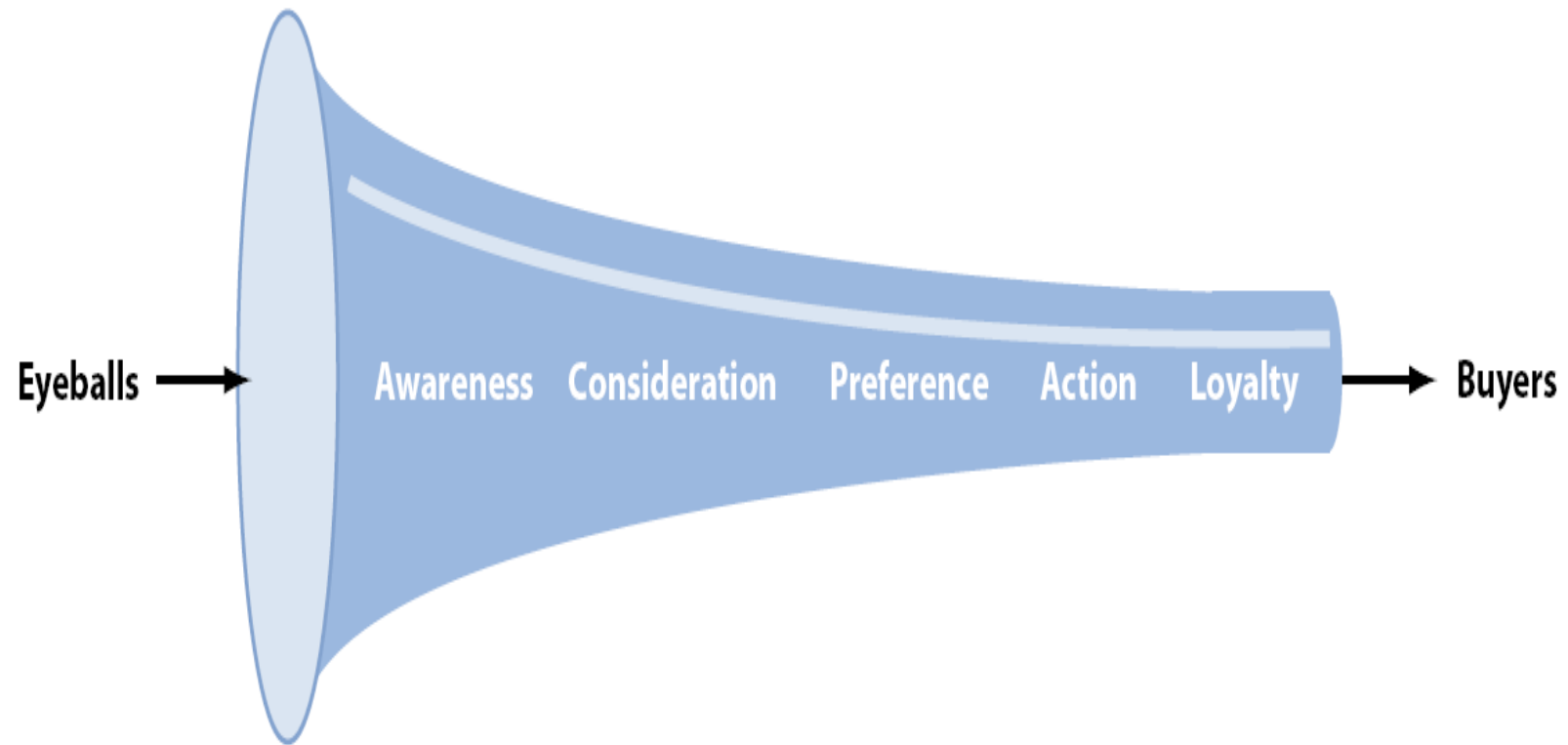
**Old World CRM**



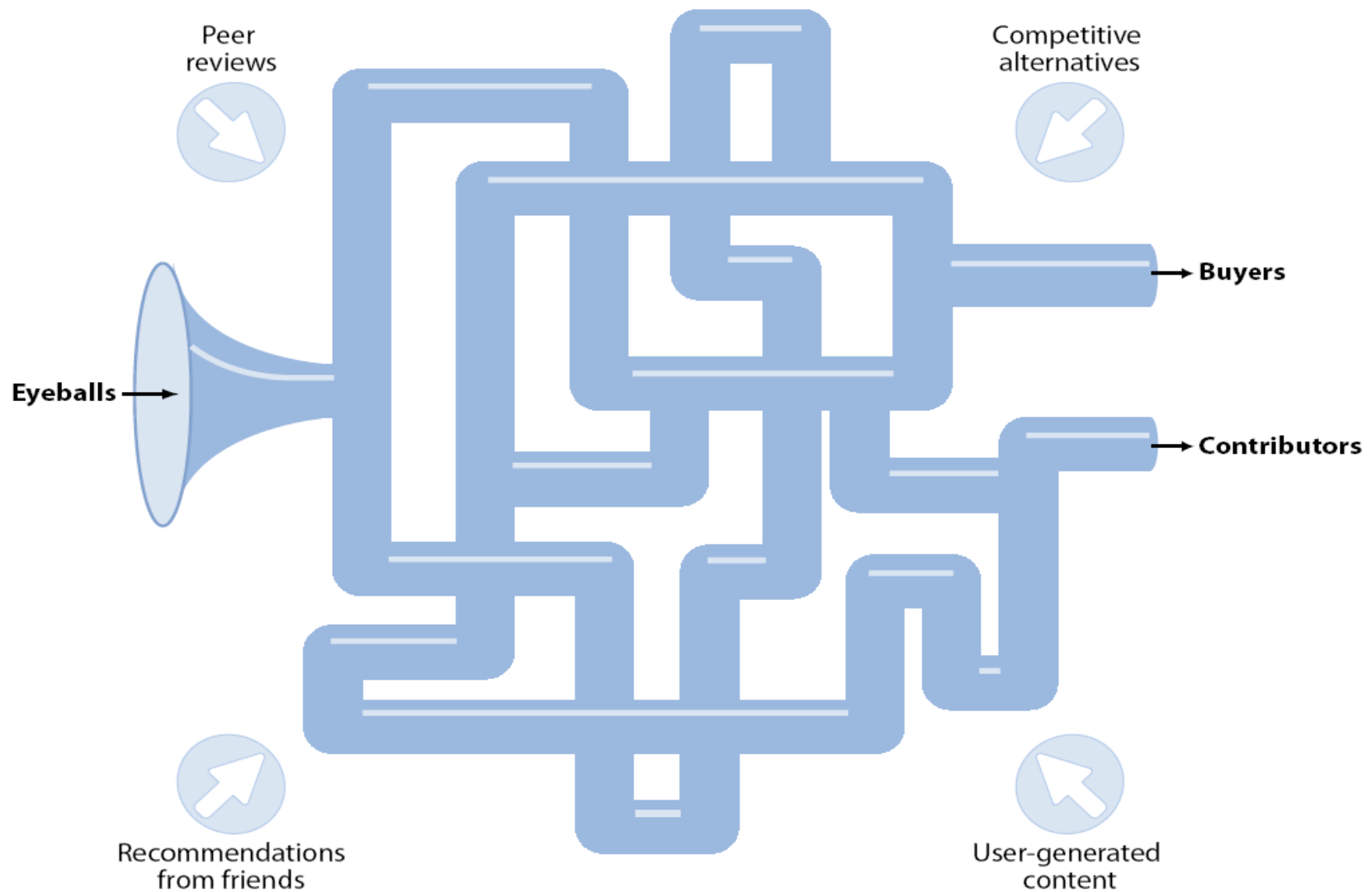
**Social CRM**



# Change: Traditional Buying Model



# Change: New Buying Model



# Change: Social is Changing Business



# The New Rules

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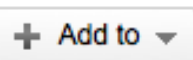
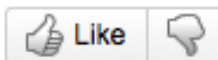
# Rule #1: You Are Not In Control

## United Breaks Guitars

sonsofmaxwell

17 videos

Subscribe



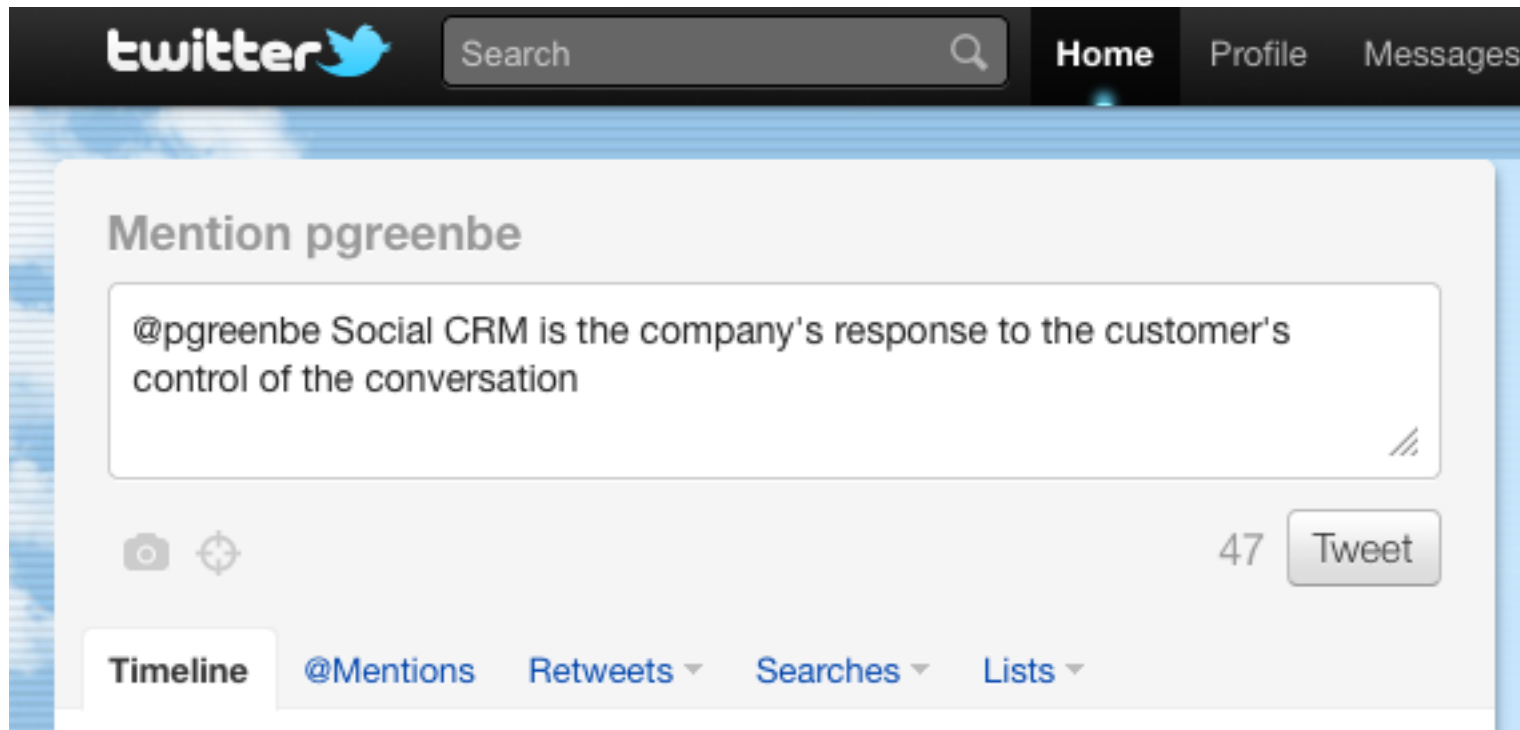
Share



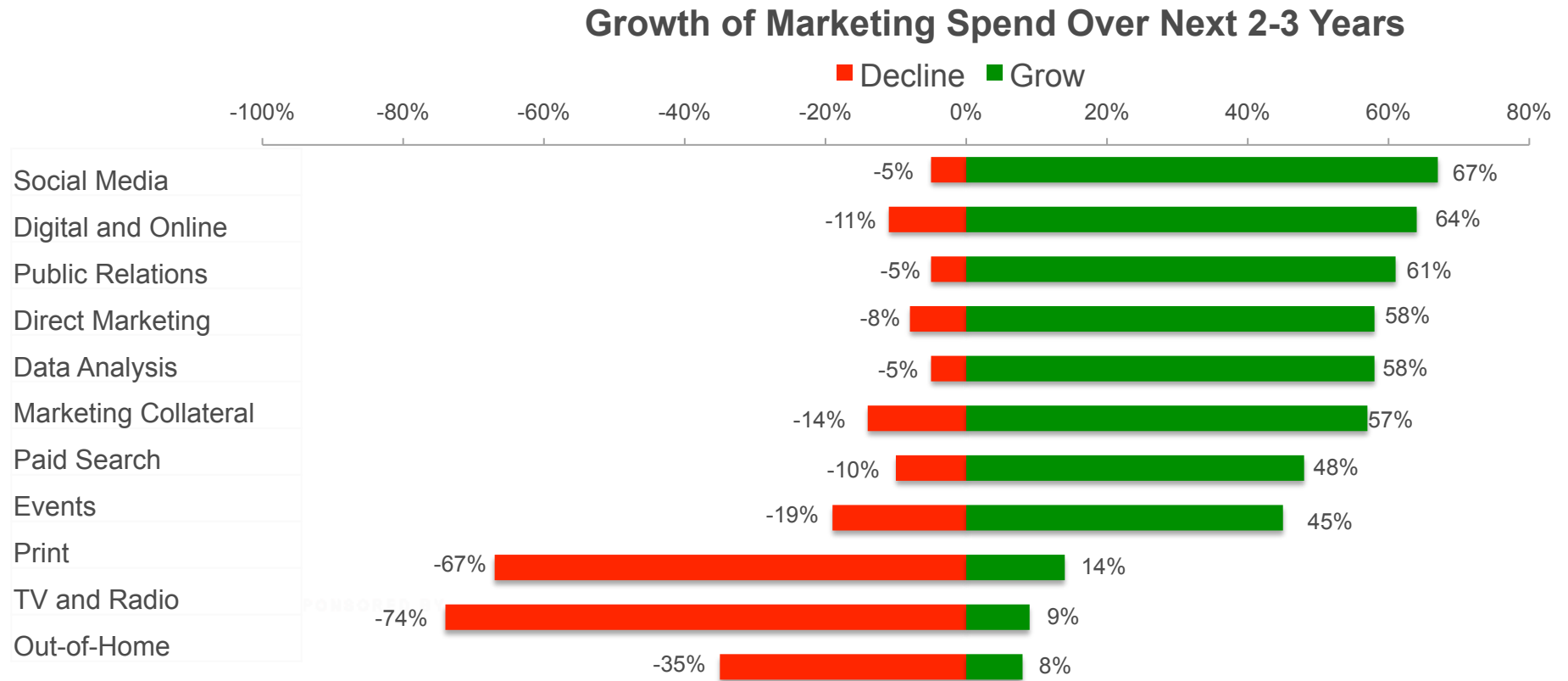
10,836,195



# Customers Manage You



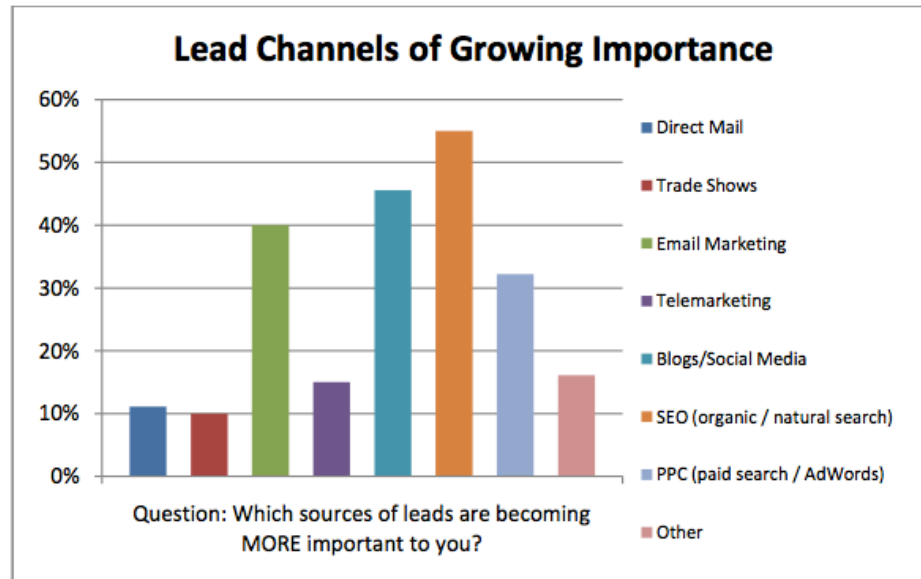
# Rule #2: Traditional Marketing is Declining



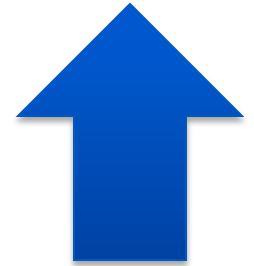
Source: Booz & Company's B2B Marketing Survey 2010



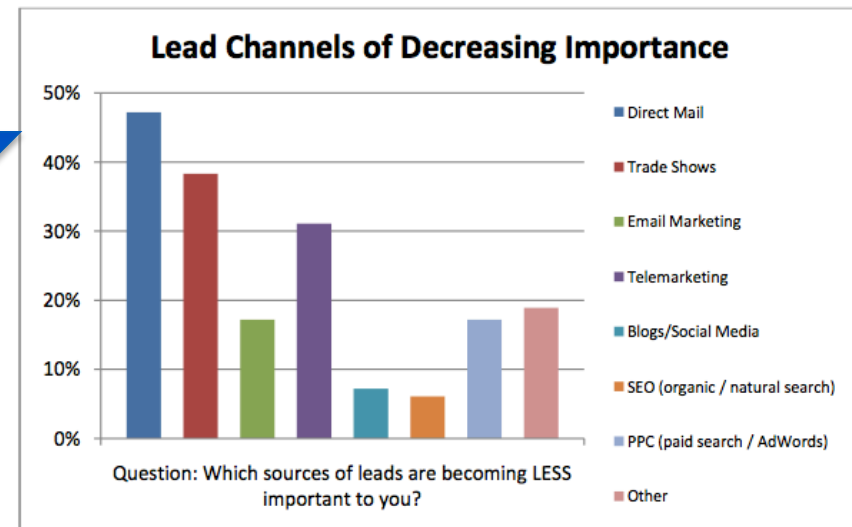
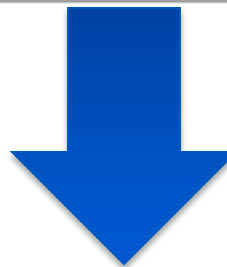
# How People Connect with Companies



Inbound  
Permission  
Customer-Driven



Outbound  
Interruption  
Vendor-Driven



# Rule #3: Customer Service IS Marketing



Start a Chat

Send an Email

Sales: 1-800-961-2888

(Enter Search Term)



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



## MANAGED HOSTING

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

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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

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MORE

## EMAIL & APPS

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

[More about Email & Apps](#)

LEARN  
MORE

**LET'S TALK**

SALES QUESTIONS?  
start a Live Chat

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

**Get Social**  
The Social Business Roadshow

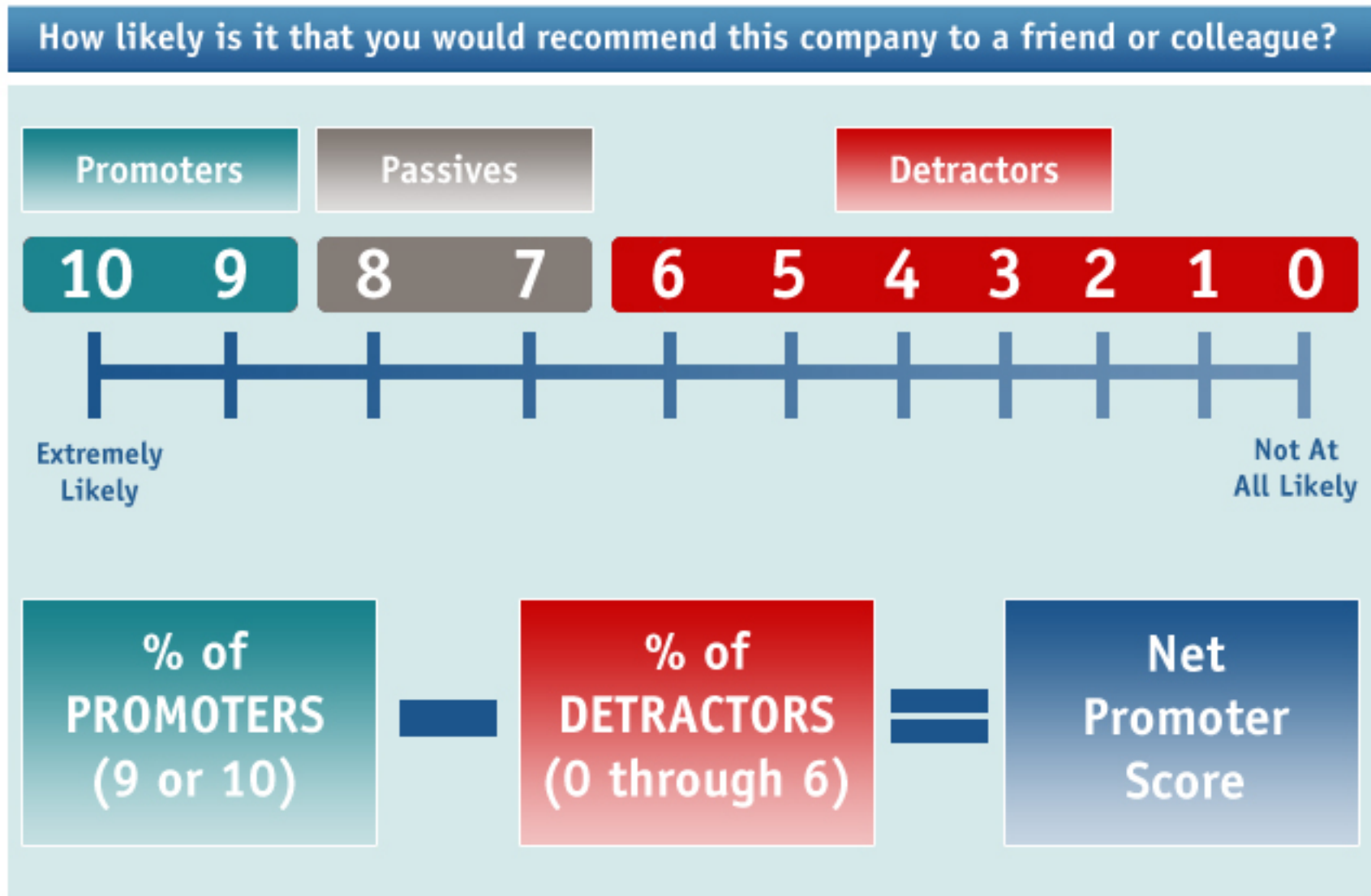


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# The Ultimate Question



# Rule #4: Join the Conversation

facebook

Search

Home Profile Account

THE ZAPPOS.COM

**FAN OF THE WEEK**



Lilly  
Veesburg, VA

**Thanks For Being A Fan!**

Share a picture on our wall and you could be our next fan of the week!

**Rules:** The Zappos box must be included in your shot.

**Zappos.com**  
POWERED by SERVICE®

Wall  
Info  
Zappos  
Jobs  
Photos (347)

**Zappos.com** ▶ Zappos

Company

**Zappos.com**  
POWERED by SERVICE®

JOIN OUR EMAIL LIST!

SUBMIT

REVIEW THE TRENDS



LOOK 1



LOOK 2



LOOK 3



LOOK 4



**You and Zappos.com**

Roberto Lino and Axel Schultze like this.

**People You May Know** See All



**Jeff Tichenor**  
3 mutual friends  
Add as friend



**Anastasia Vermeiren**  
1 mutual friend  
Add as friend



**Eric Nimtz**  
15 mutual friends  
Add as friend



**Rich Anstett**  
13 mutual friends  
Add as friend

**Account Protection**

Your account protection status: **Medium**

Increase Protection

## 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”



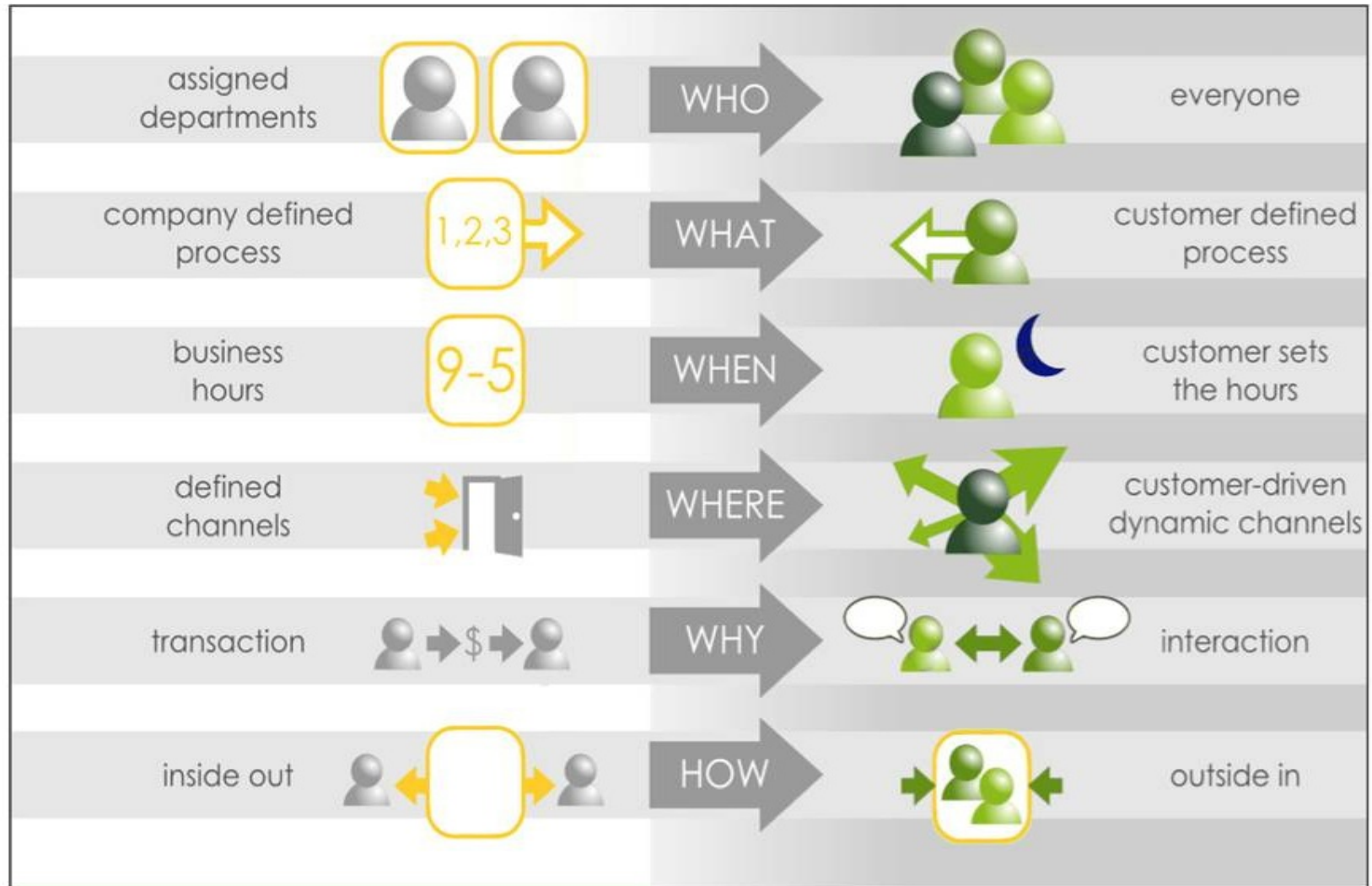
# Rule #5: Integrate People with Technology



Sydney restaurant replaces menus with iPads

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

# Evolution



# What Now?

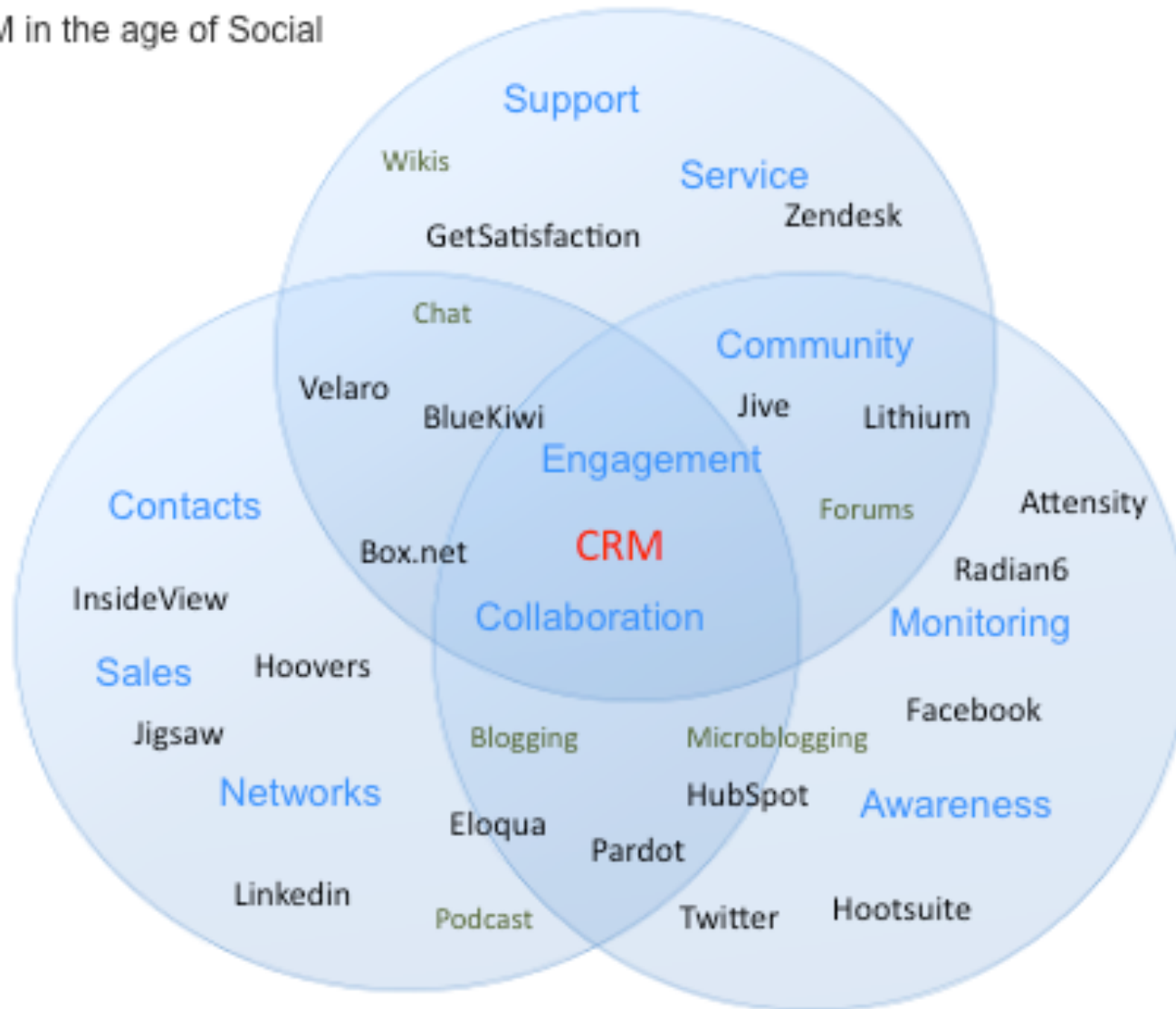
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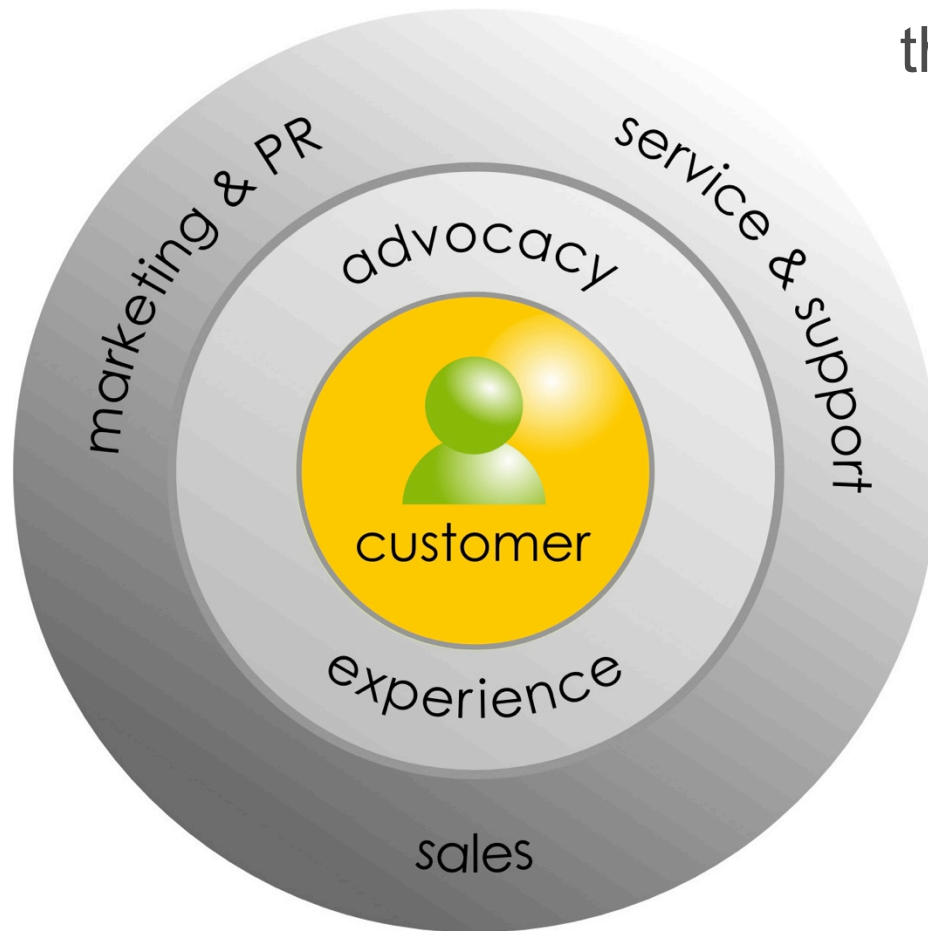
# Bring Order to Customer Management

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**

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

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# **From Social Media to Social CRM**

**Kathleen H Cook ,  
Mid-Market Business Development Executive**



# The Mid-Size Company

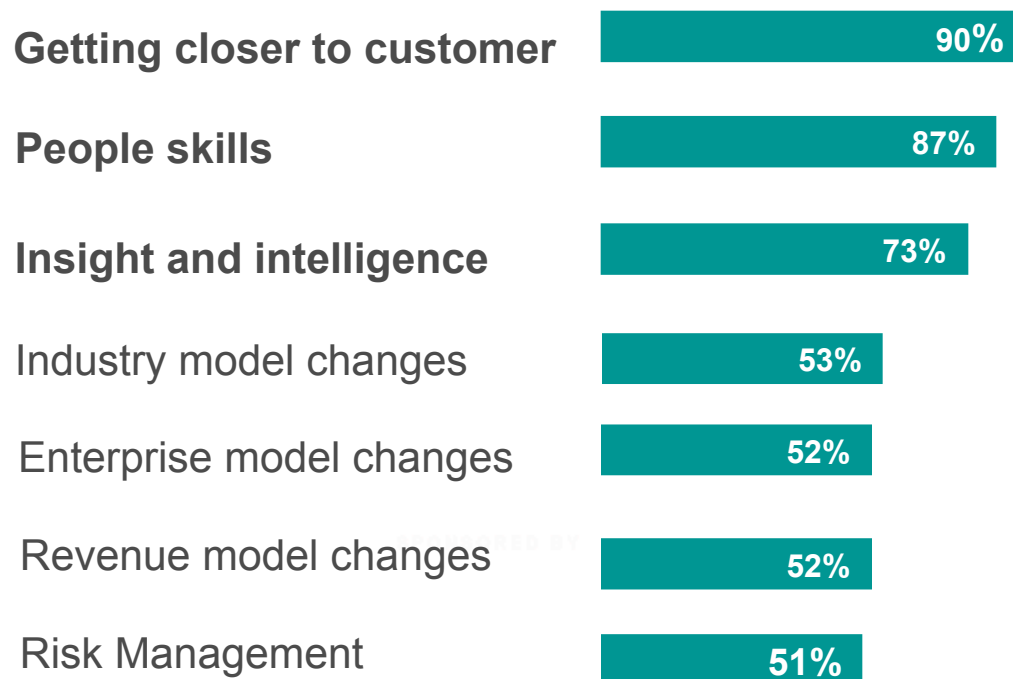
- Generally < 1,000 employees
- Drivers of economic growth: 65% of Global GDP
- Employment: 90% of the global workforce
- Innovation: 13x more patents per employee than large enterprises
- Reach: Fastest-growing portion in emerging markets



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 both highly focused on insights, clients and people skills: **Inside and Outside**

### Midmarket CEO focus over the next 5 years

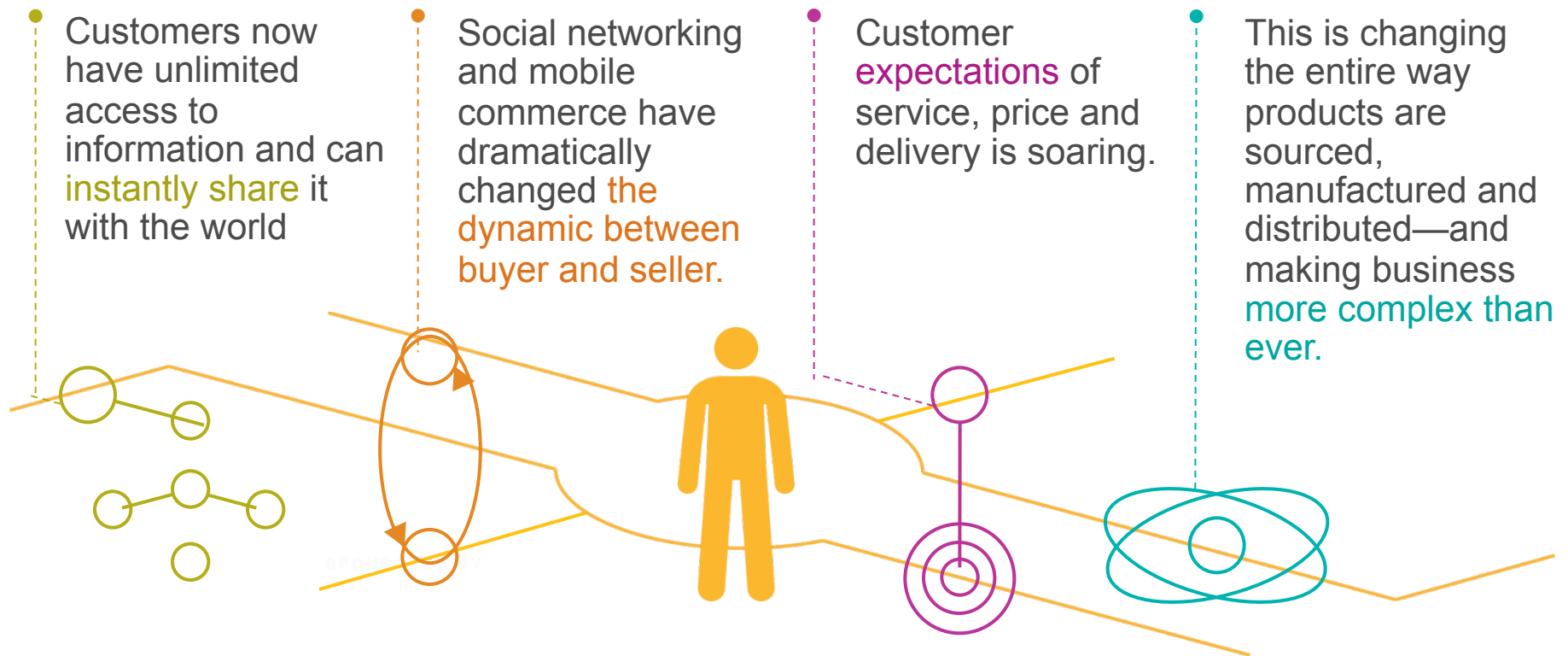


### Midmarket CIO focus over the next 5 years



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

# Along with increase in complexity and market changes, customers have moved in to a position of power that is forever altering the relationship between business and customers



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

Customers interact with a brand or business in social media primarily to get something of tangible value, e.g., discounts, purchases, deals, as well as access to needed information. Businesses want to realize an ROI for social media. *It's the ultimate win-win.*

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

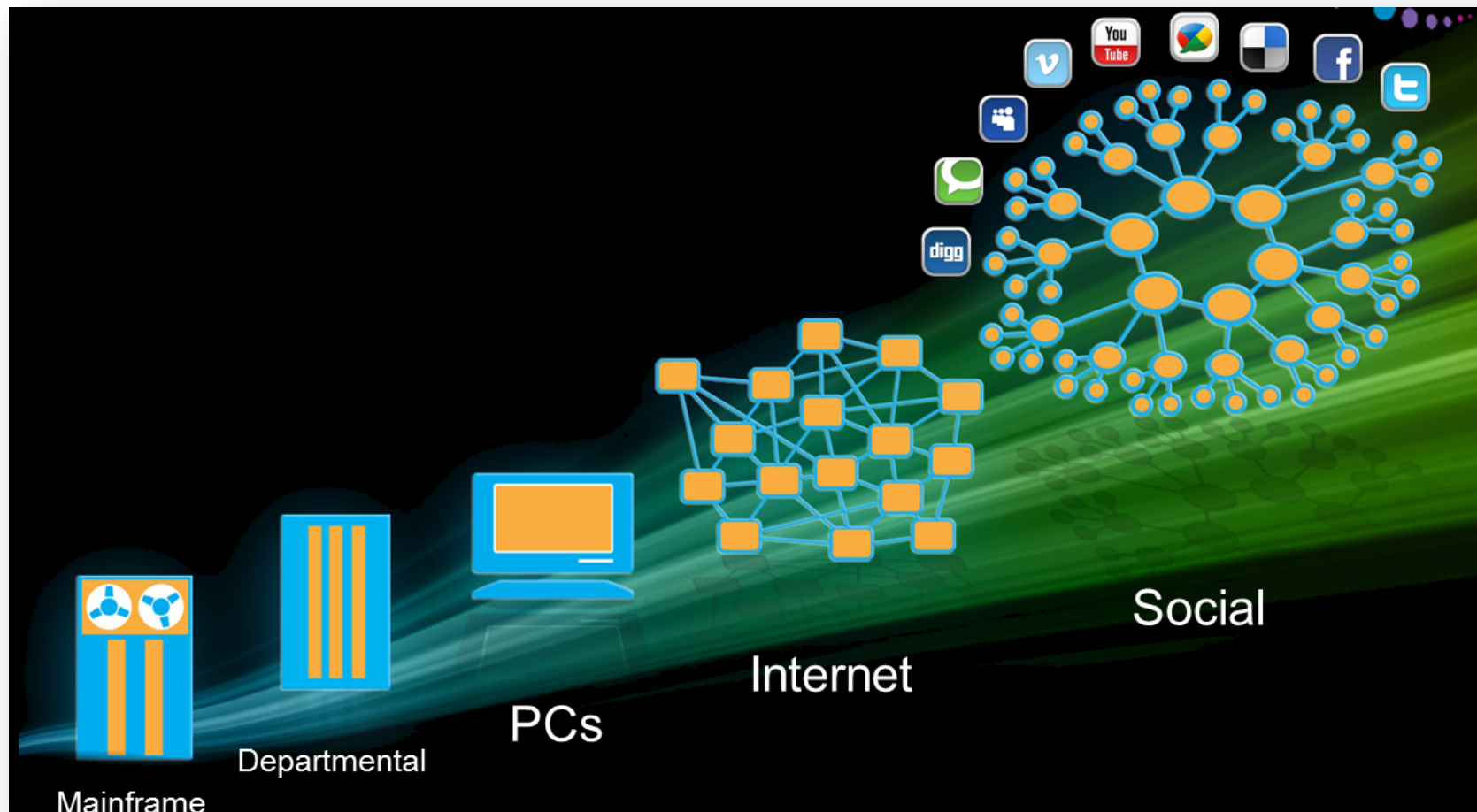


*"We saw an opportunity to engage Cold Stone's loyal customer base and social media following to drive a measurable impact on in-store sales."*

*Dan Beem, President, Cold Stone Creamery*



# The Fifth IT Era: The era of Social Business



# Social is Generational, Geography & Cultural





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# Power of Social Media



“Sharing”

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“Digital Trail”

# Why should you care? = Speed

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

*about 19 hours ago from TweetDeck*



davepeck

Dave Peck

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

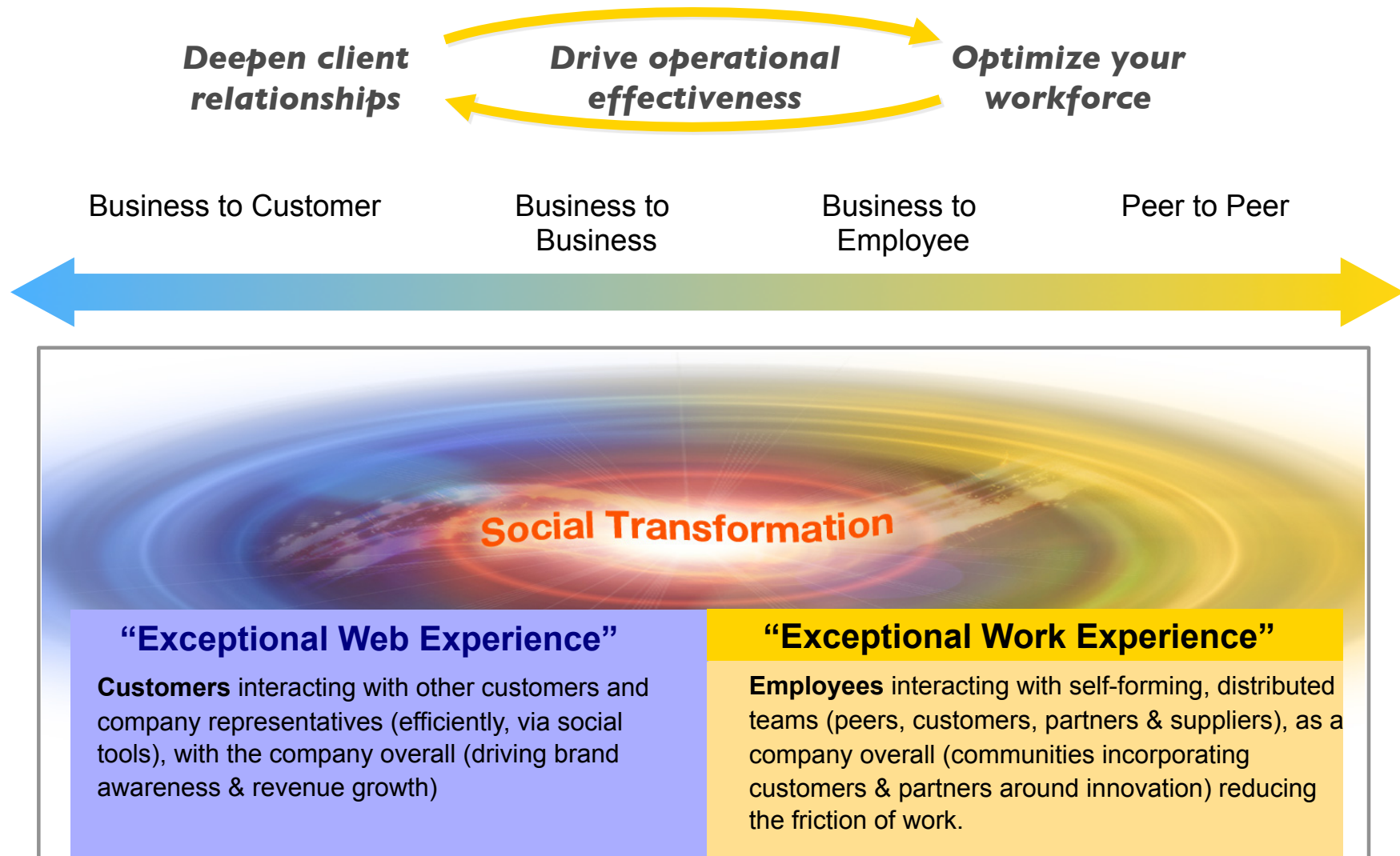
*about 19 hours ago from TweetDeck in reply to davepeck*



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**

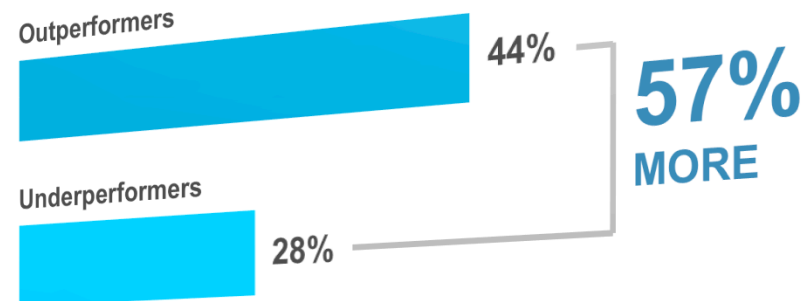
# Why should you care?

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



# Social Business Catalysts: Top Down and Bottom Up



CEO

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



Multiple Divisions

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# Social Business Catalysts: Bottom Up and Top Down

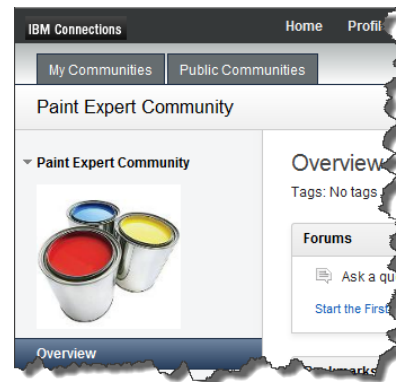


Sharing Knowledge  
Accident  
Deliver 1m+ sales of  
single product



298K Employees  
17K Salary  
Managers

Subject Matter  
Expert



# Move from Document Centric to People / Social Centric Model

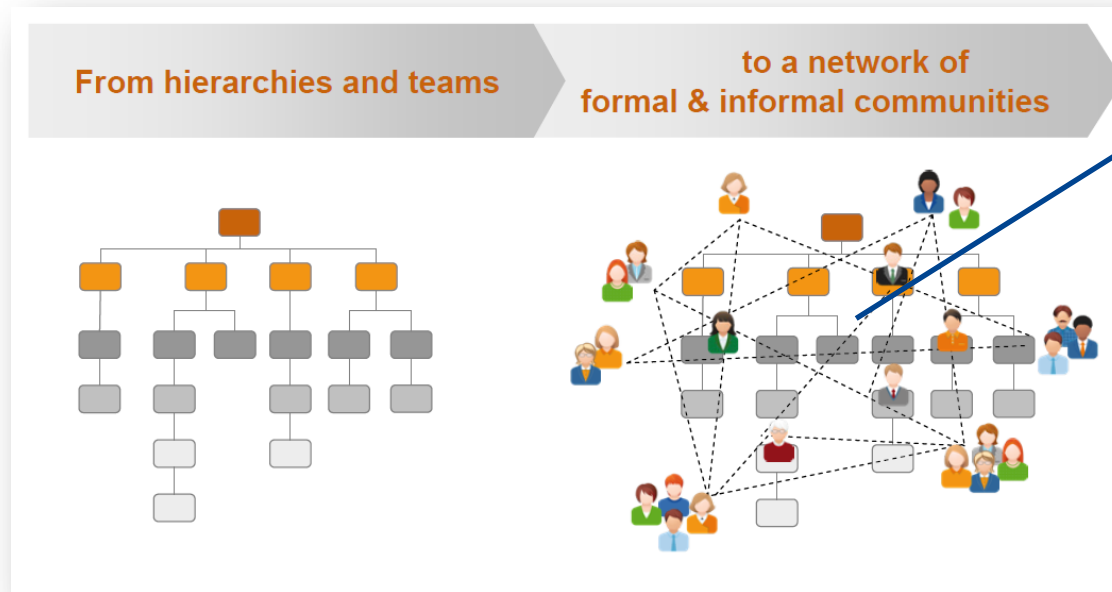


**Document Centric**



**People / Social Centric**

# Looking at the power of the company by removing the hard coded hierarchy



**“Conversations”**  
**“How you are connected”**  
**“Break down Barriers”**  
**“Empowered”**

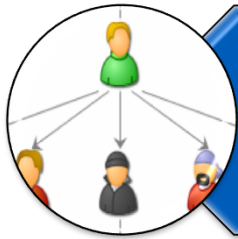
Shift also represents a change in business communication. The old approach was to mandate from above. The new approach is to enable the enterprise to collaborate where and when it needs to, with a wide array of tools, resources and guidance. Shift is the collaboration platform, the place and the process where this happens at CEMEX.

# Change in Thinking by Role: Why do they care?



## Company

- Capture Knowledge
- Attract & Maintain Great Talent
- Mentor Program



## Line of Business

- Driving Business Initiatives
- Understanding “Tipper Model”
- Communication Channel



## Manager

- Promote members of team
- Ease Job transfer
- “Follow” people for carrier



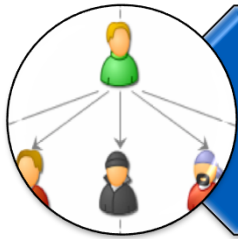
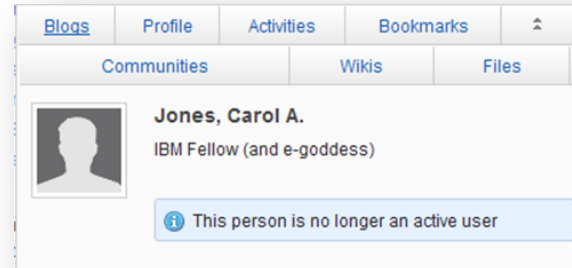
## Employee

- Digital Reputation
- More valuable when share
- Gives time back (Strategic)

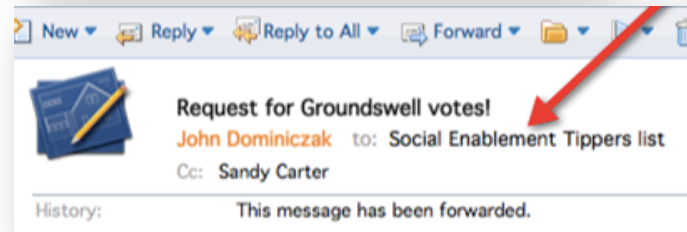
# Change in Thinking by Role: Why do they care?



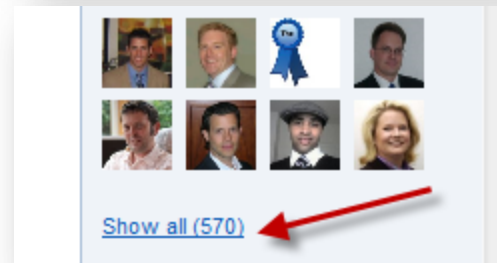
Company



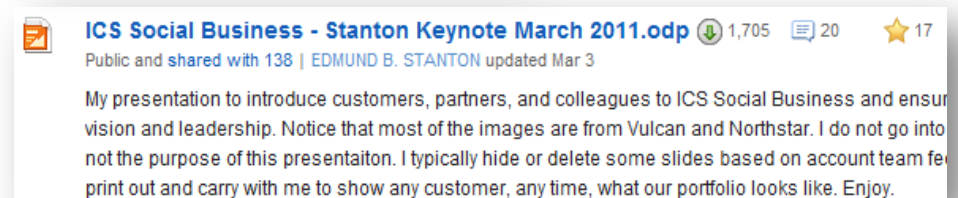
Line of Business



Manager



Employee





# 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 & SugarCRM for Social Business

IBM & SugarCRM deliver Social Business either on premises or in the cloud

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

IBM is about connecting social and collaborative capabilities across all business processes that customers use to run their business.

## 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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# Networking and Coffee Break

**15-20 minutes**



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# How Do You Integrate Social Media

Clint Oram, co-founder and CTO, SugarCRM



# Start With the Customer



Start with  
the customer



# Put the customer at the center



# CRM: Enable the sales edge

INNER CORE

SALES EDGE

CUSTOMERS

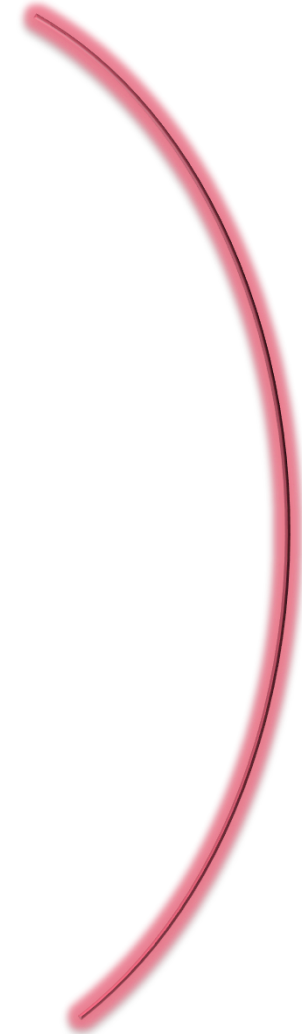


SALES

CUSTOMER  
SERVICE

CALL  
CENTER

MARKETING



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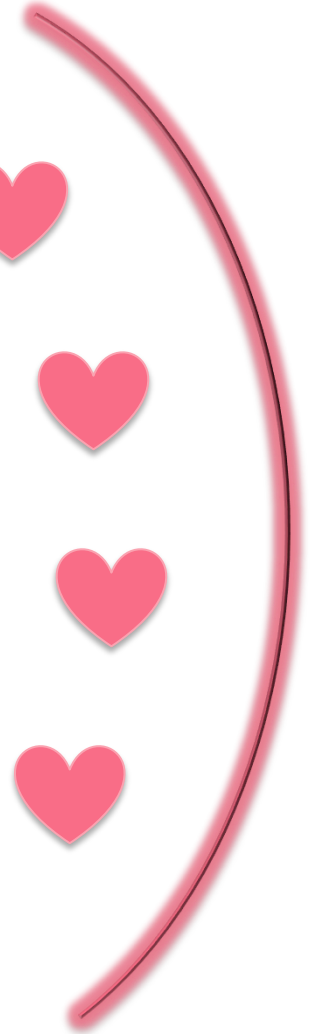
# Social CRM: Enable the customer edge

INNER CORE

SALES EDGE

PARTNERS

CUSTOMERS



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# Basics of an Open, Social CRM



# CRM Made Simple

**Intuitive**

**Open**

**Flexible**

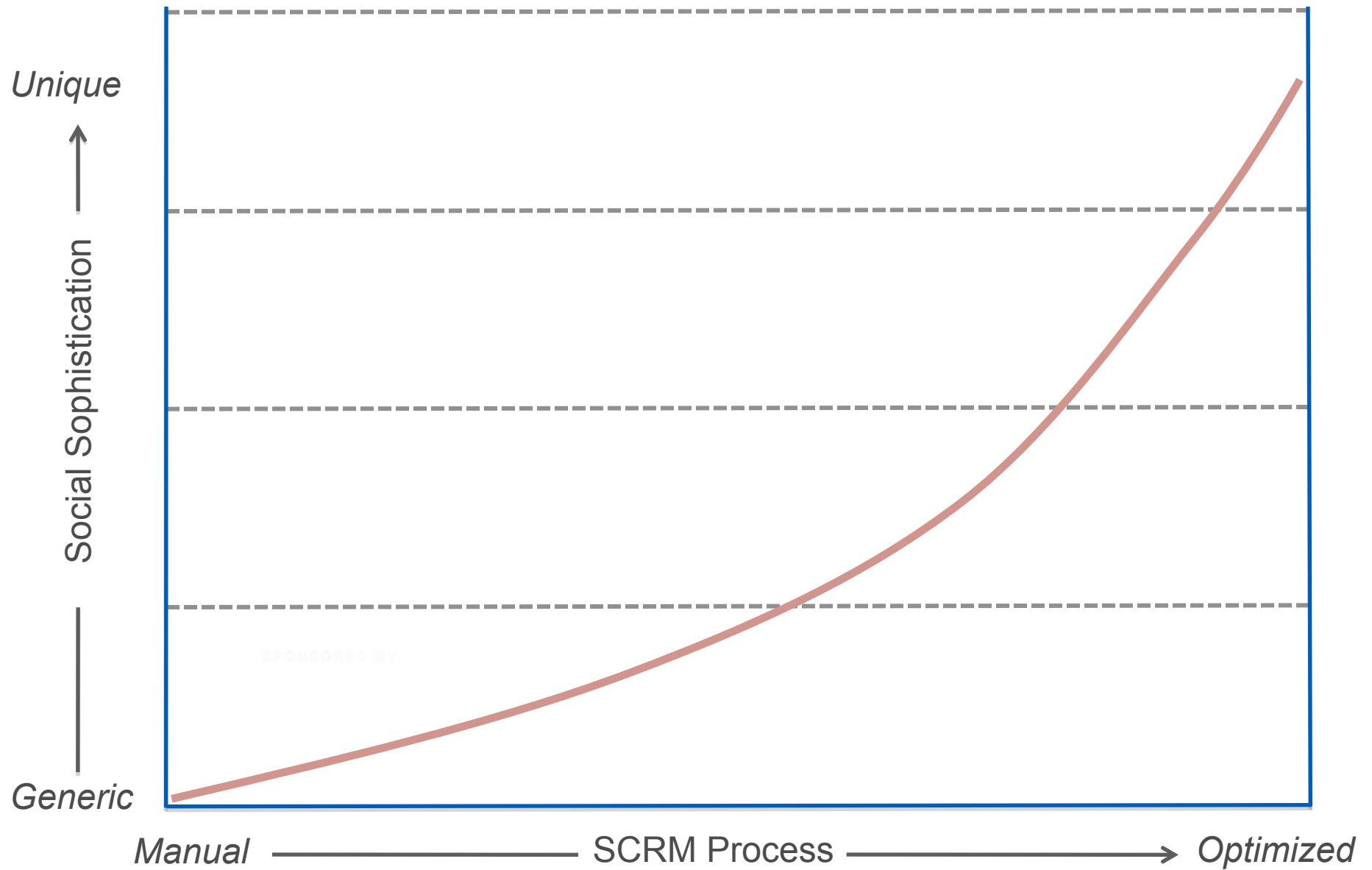
**Social CRM = Open CRM = Mobile CRM**

# Where Do You Start?

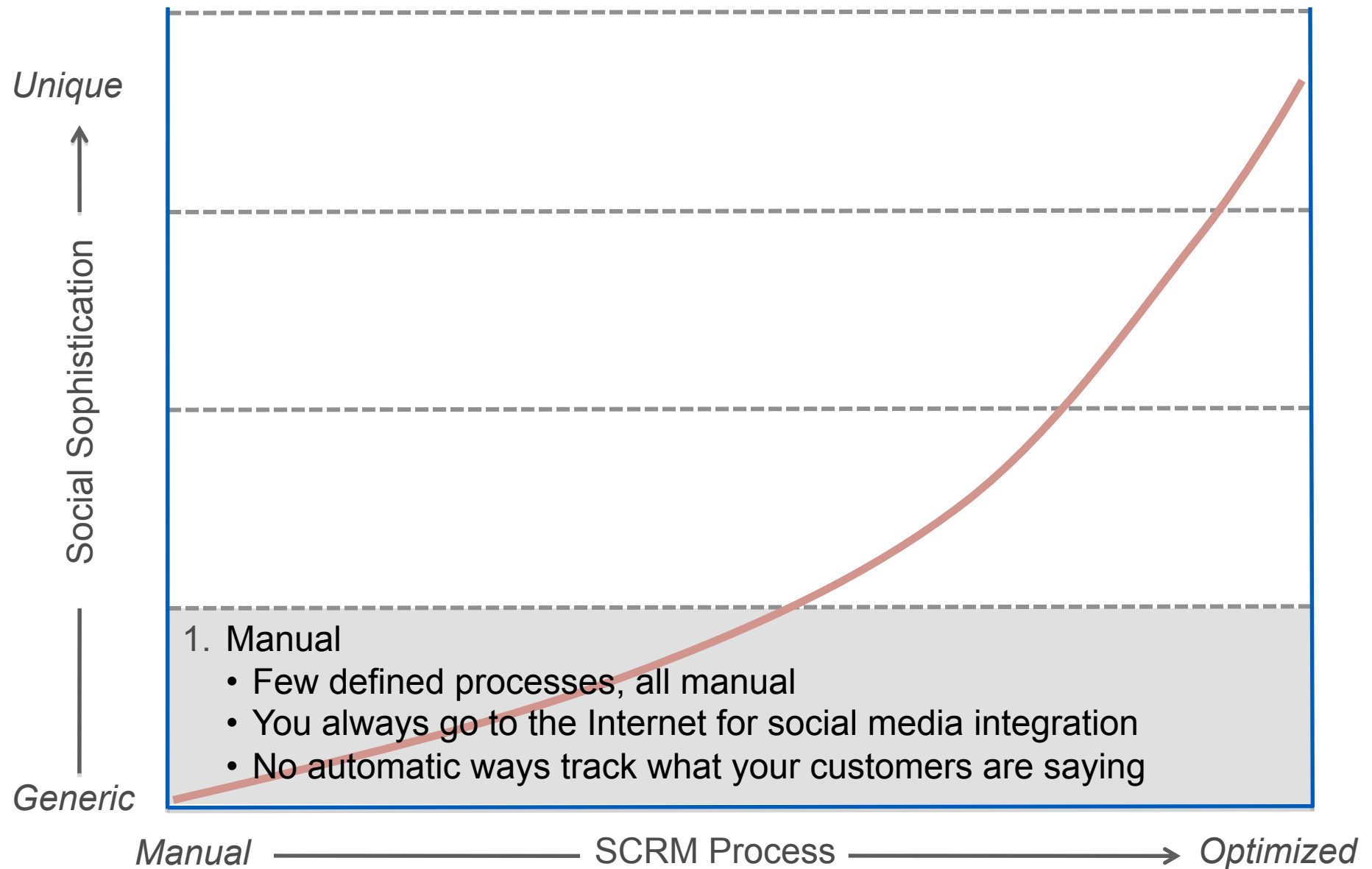


Think Big  
Start Small  
Move Fast

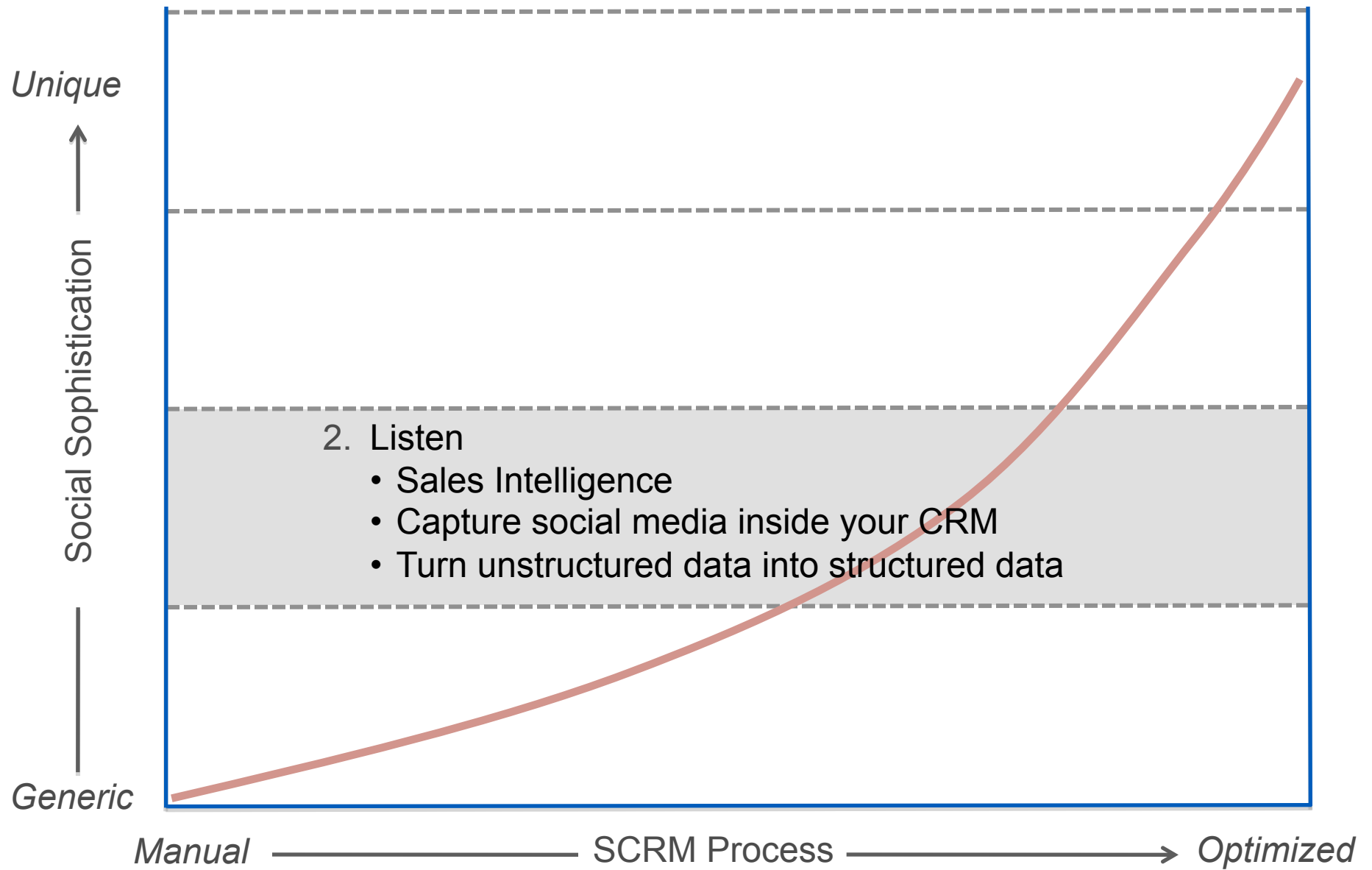
# Social CRM Adoption Curve



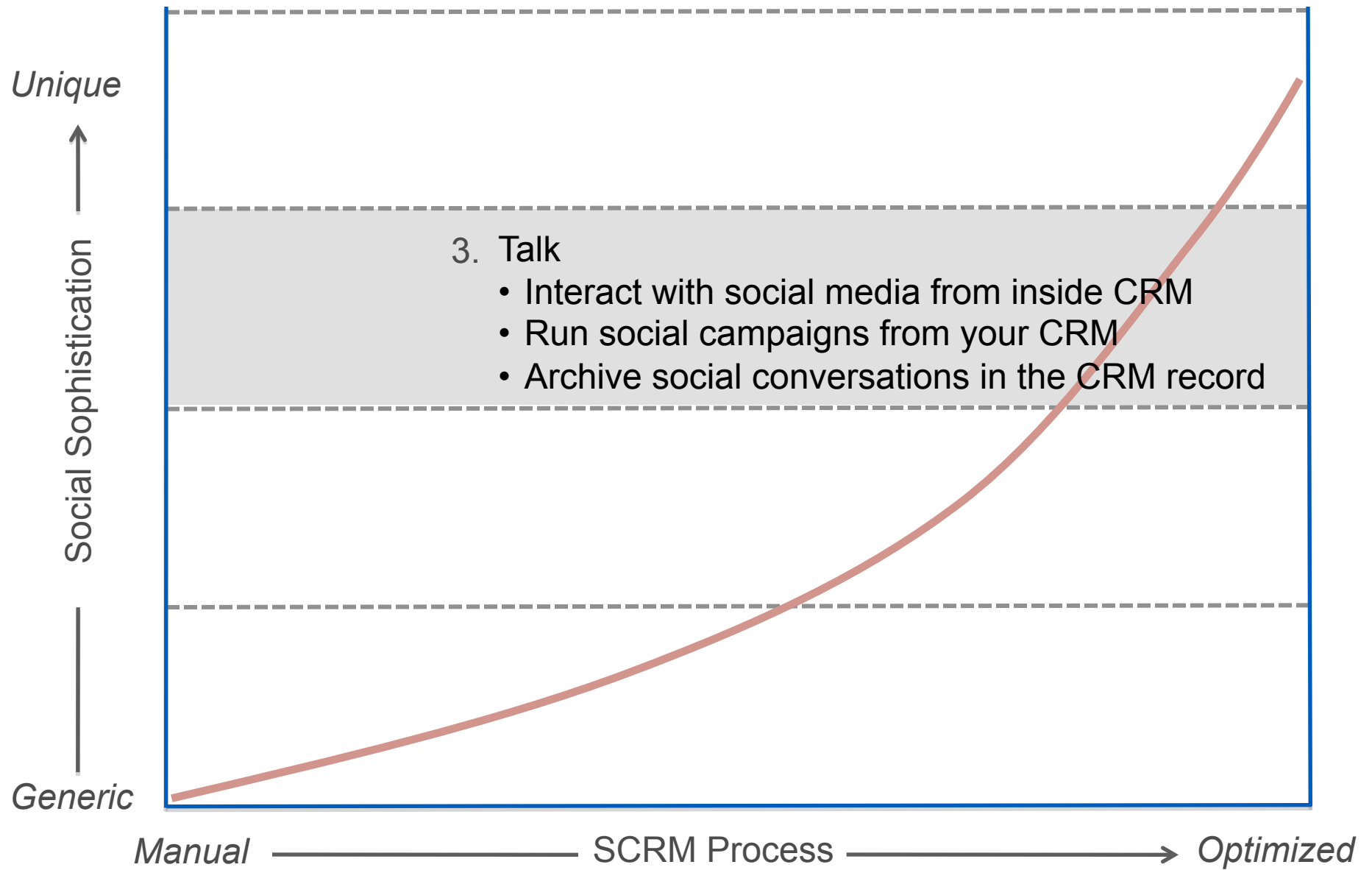
# Social CRM Adoption Curve



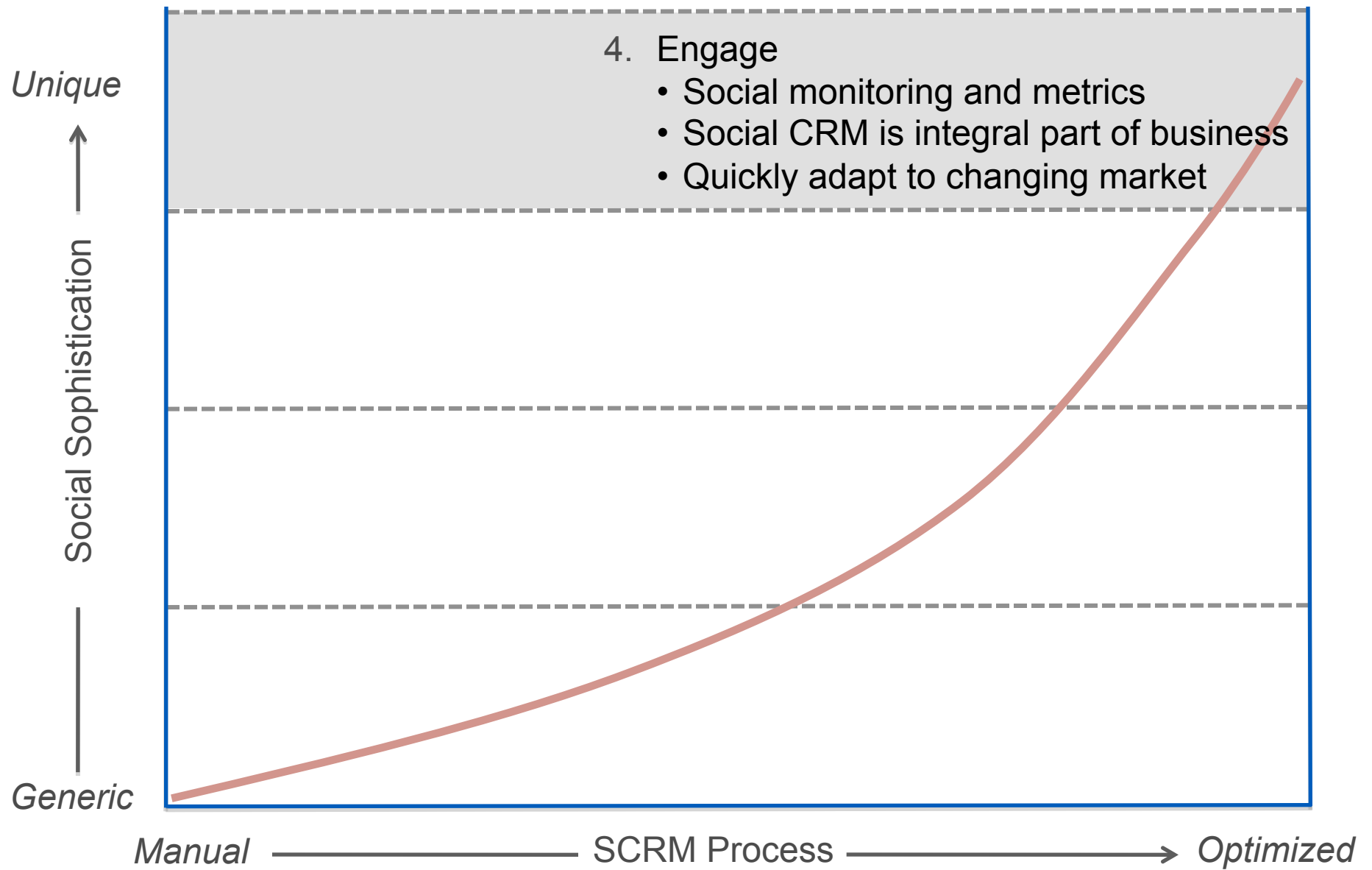
# Social CRM Adoption Curve



# Social CRM Adoption Curve

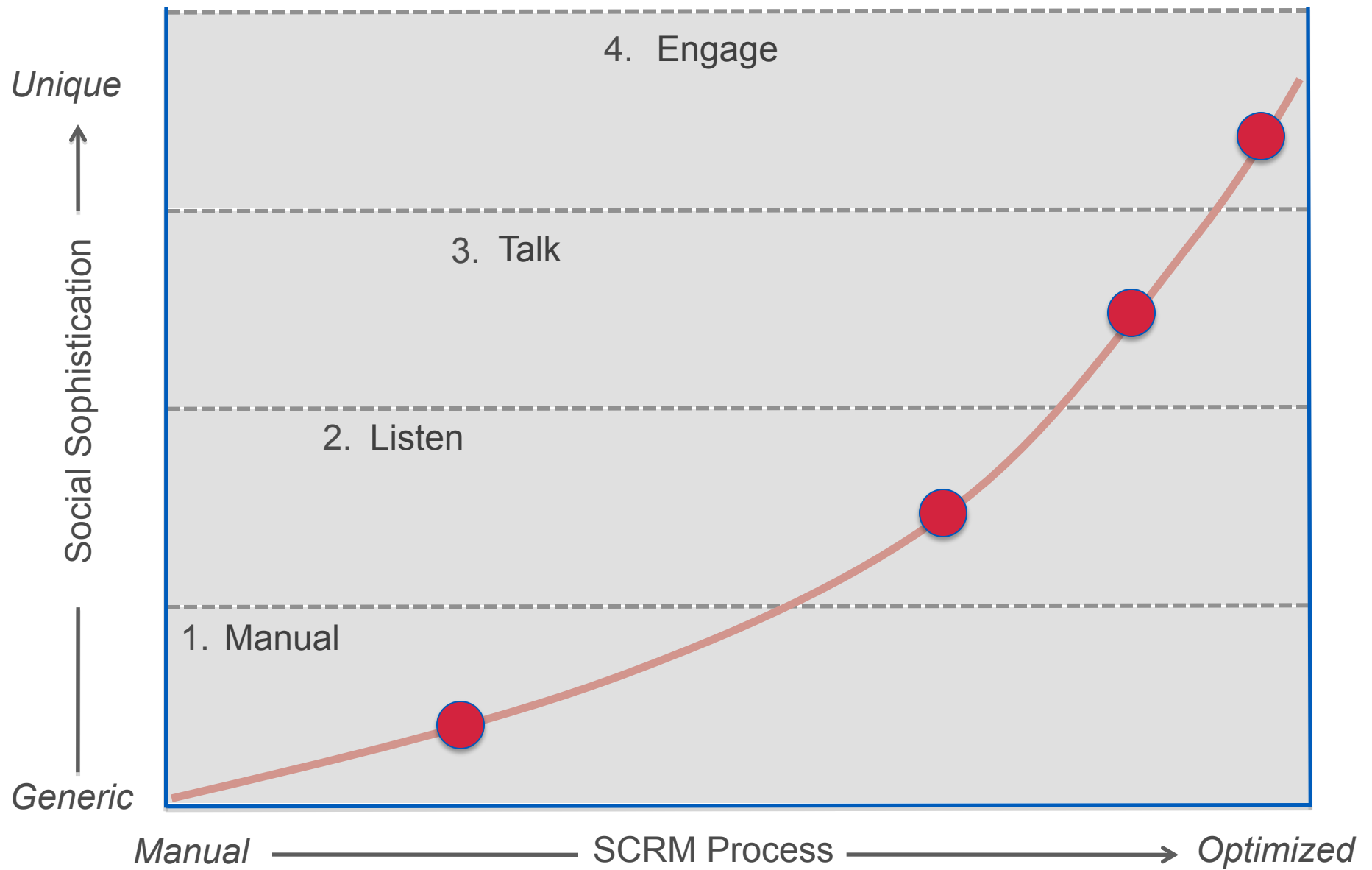


# Social CRM Adoption Curve

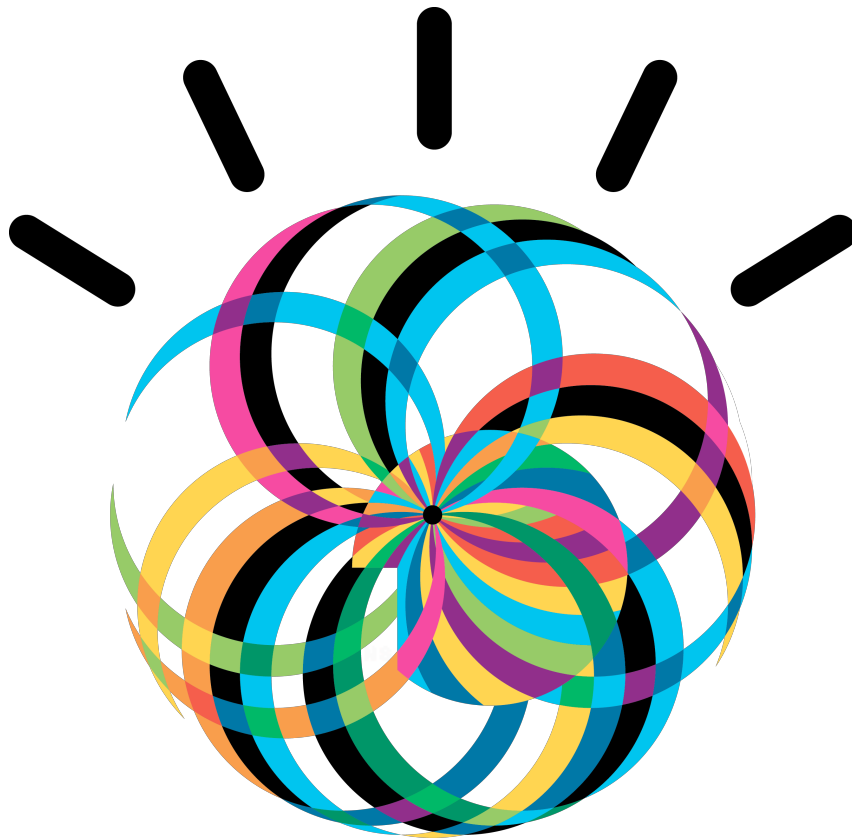




# Key to Social CRM is Following the Curve



# Sugar and IBM Social Media Integration



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

# Overview

- 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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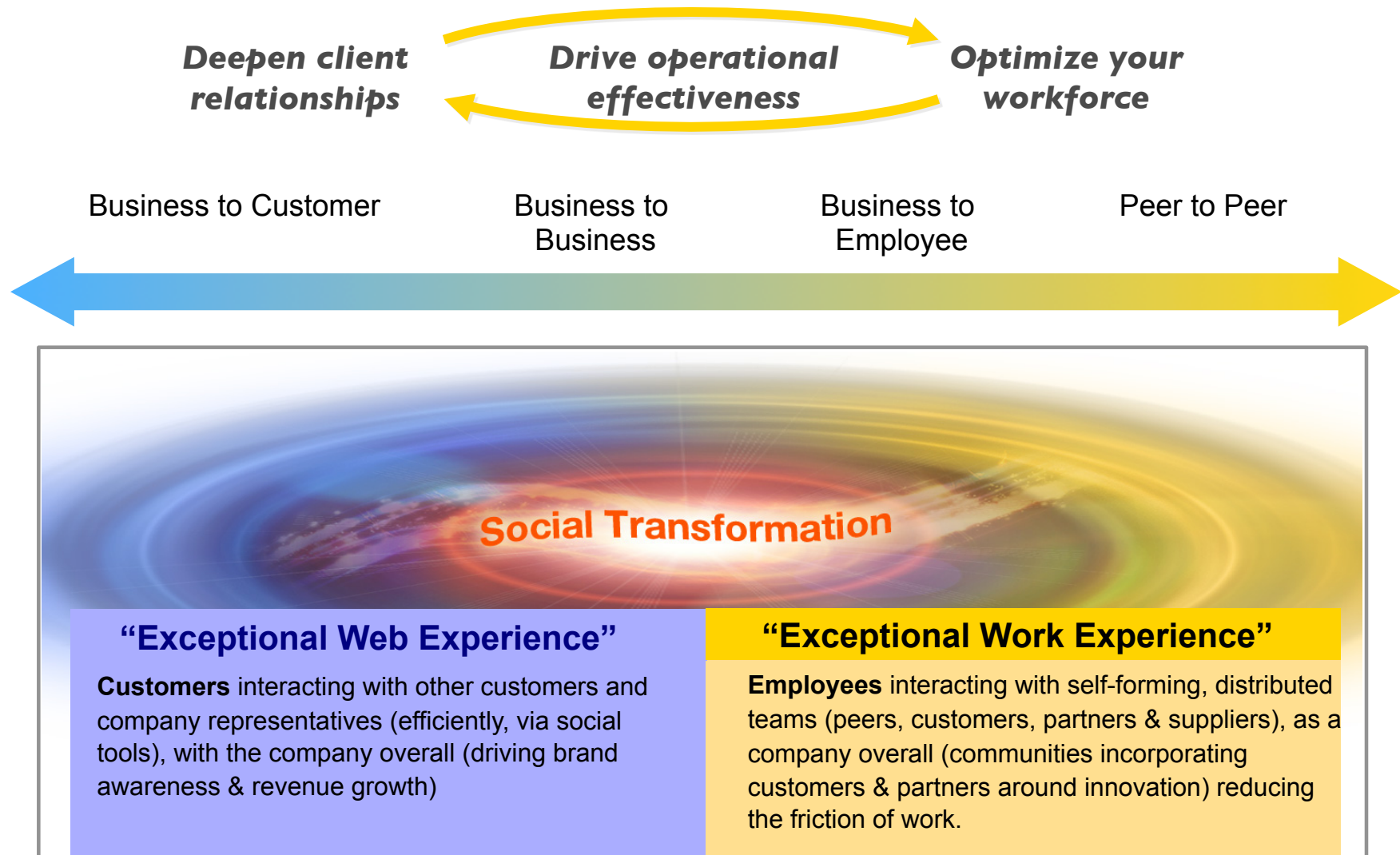


# **Best Practices for Becoming a Social Business**

**Kathleen H. Cook,  
Mid-Market Business Development Executive**



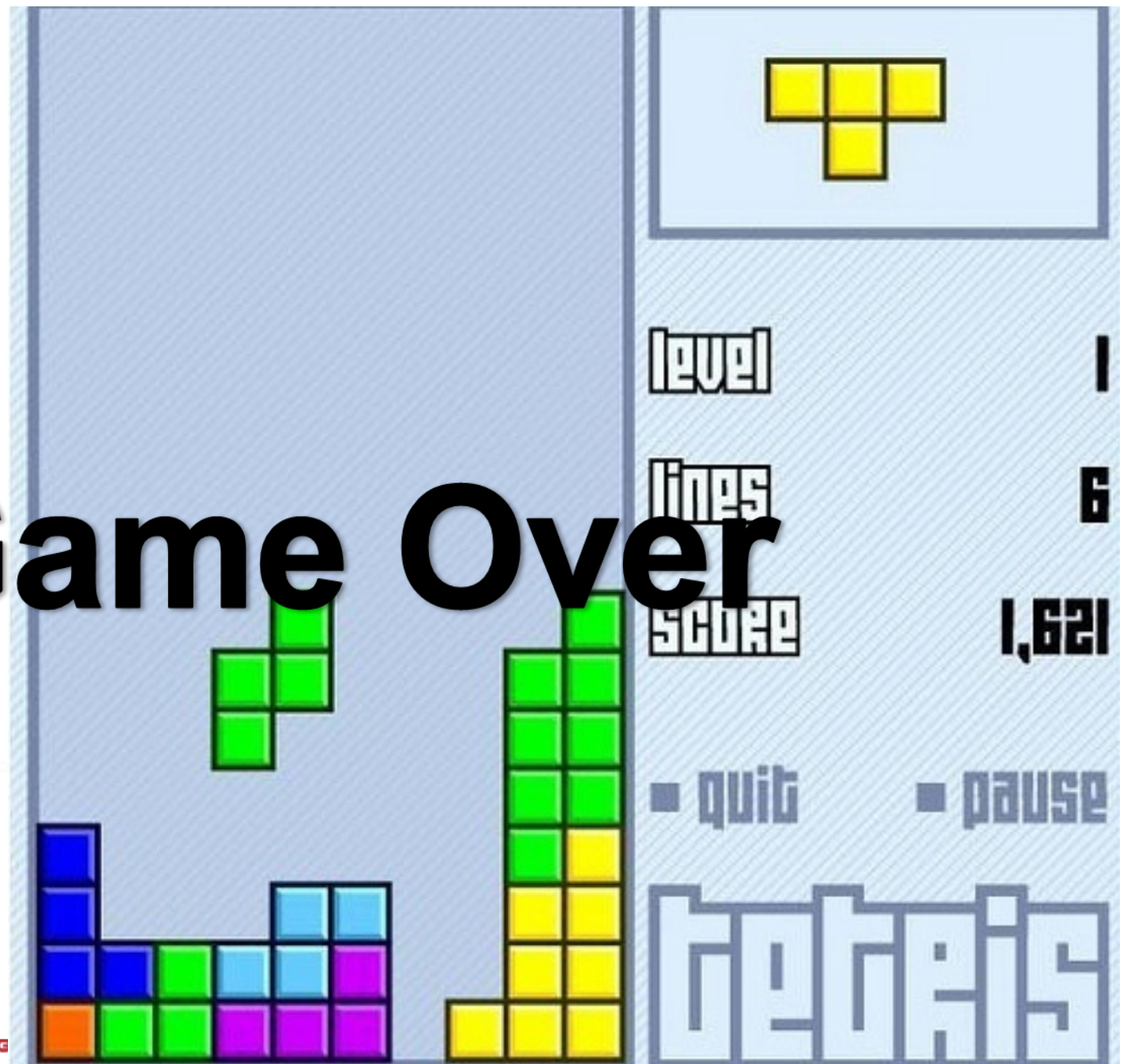
# Social Business Transforms The Customer And Employee Experience



Too Much  
Mail = "Tetris  
Mail"



**Game Over**



Customer Info - IBM Lotus Notes

File Edit View Create Actions Attachment Tools Window Help

Open Home Repli... Chri... Lotus... Chart... New M... Chri... > Cus...

Lotus Quickr Publish Draft Check In Check Out Files Search All Mail

New Reply Forward Display More

**Customer Info**  
Mark W Lewis to:  
Sent by: **Connections-Communities@RESEARCH**  
Bcc: Chris Crumme

07/20/2009 01:14 PM  
[Show Details](#)

Contracts MLM New Plans Process Narrative 022309.pdf Contracts MLM Plan Changes Process Narrative 022309.pdf Contracts NA New Plans Process Narrative 022309.pdf

Contracts NA Plan Changes Process Narrative 022309.pdf Contracts NA RFP Review Process Narrative 022309.pdf Contracts New Plans MLM Process v0.2.vsd

Contracts New Plans NA Process v0.2.vsd Contracts Observations & Talking Points 03-05-09.pdf Contracts Opportunities 03-11-09.xls Contracts Plan Changes MLM Process v0.2.vsd

Contracts RFP Proposals Review NA Process v0.2.vsd PPI Contracts Update 03-16-09.ppt CBF Business Partner Update - 20090127b.zip

CBF It Strategy - Product Area Capability Definitions v9 (version 1).tr.xls 2006-12-26\_Institutional\_SISP.pdf TCREF\_FutureVisionValueChains-27Sep05-v2.ppt

WorldWide Sales Forecast.otp Biweekly time sheet1.xls budget\_2.xls business controls.ods january.doc Marketing budget plan1.ods marketing\_06.ppt

press\_release.docx Sales Status Meeting Report.odt Subprime Mortgage Data.xls

Online



New Message - IBM Lotus Notes

File Edit View Create Actions Text Tools Window Help


Open Home Repli... Chri... Lotus... Chart... New M... Chri... New ...

Lotus Quickr Publish Draft Check In Check Out Files Search All Mail

Send Send and File... Save as Draft Reply to All Delivery Options... Display More

To: Mark W Lewis/White Plains/IBM@RESEARCH@IBMUS.  
Cc:  
Bcc:  
Subject: Re: Customer Info

**THANKS**

Frank Adams  
Renovations  
617.693.0440 (phone) | 617.320.1672 (cell)  
  
[www.renovations.com](http://www.renovations.com)

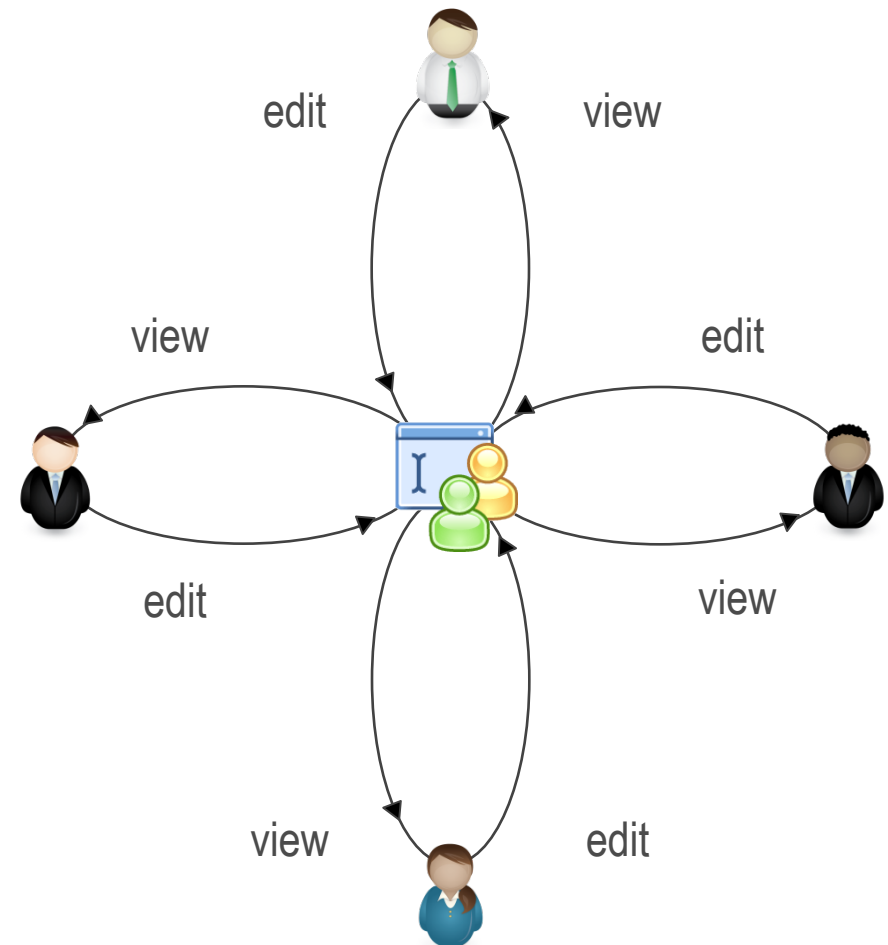
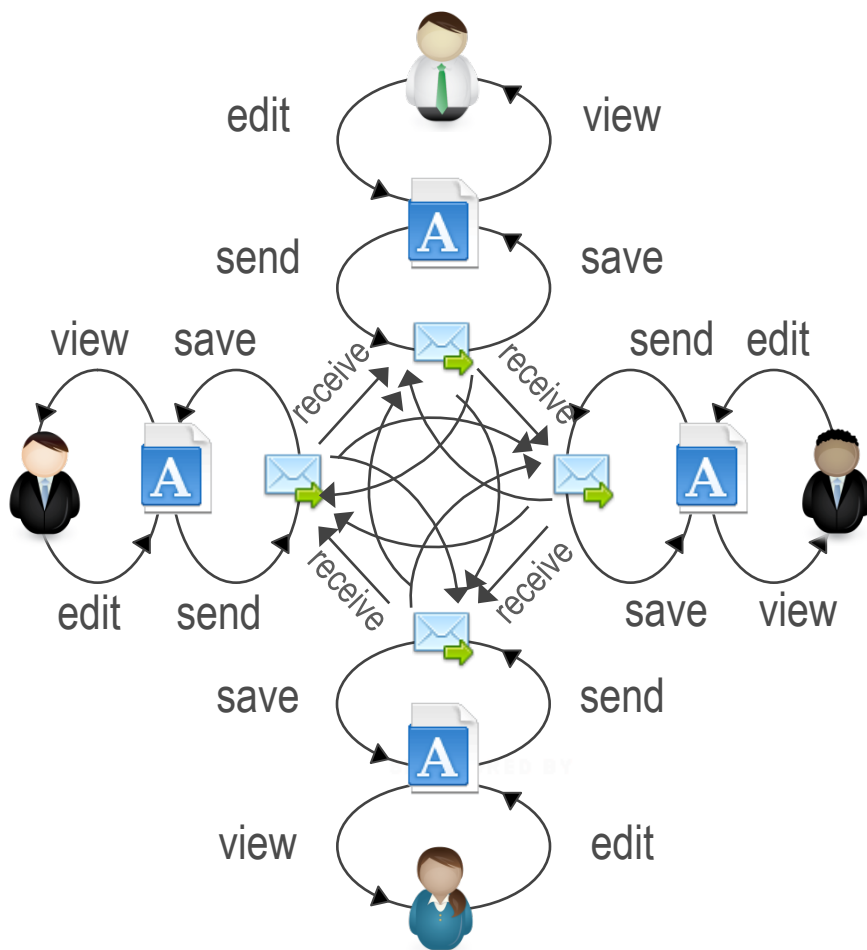
Contracts MLM New Plans Process Narrative 022309.pdf Contracts MLM Plan Changes Process Narrative 022309.pdf Contracts NA New Plans Process Narrative 022309.pdf  
Contracts NA Plan Changes Process Narrative 022309.pdf Contracts NA RFP Review Process Narrative 022309.pdf Contracts New Plans MLM Process v0.2.vsd  
Contracts New Plans NA Process v0.2.vsd Contracts Observations & Talking Points 03-05-09.pdf Contracts Opportunities 03-11-09.xls Contracts Plan Changes MLM Process v0.2.vsd  
Contracts RFP Proposals Review NA Process v0.2.vsd PPI Contracts Update 03-16-09.ppt CBF Business Partner Update - 20090127b.zip  
CBF It Strategy - Product Area Capability Definitions v9 (version 1)-tr.xls 2006-12-26\_Institutional\_SISP.pdf TCREF\_FutureVisionValueChains-27Sep05-v2.ppt

Body of message

Online



# New ways of collaborating... email is classic traditional “barrier”




Adapted from a illustration by Chris Rasmussen, US National Geospatial Intelligence Agency

# Social Collaboration

Public Wikis | My Wikis

North America GSR



▼ North America GSR

- Overview
- Members
- Discussion Forum
- Feeds
- Bookmarks
- Wiki**
- Videos (BETA Widget)
- Files

You are in: [North America GSR](#) > [Speaker Schedule](#)

## Speaker Schedule

Updated May 18 by [Leon Cruywagen](#) | Tags: [get\\_social\\_road](#)

[Edit](#) [Page Actions](#) ▼

You are in: [North America GSR](#) > [Speaker Schedule](#) > Versions

## Speaker Schedule : Versions

### Versions(191)

1-10 of 191

1 |

191	May 18	<a href="#">Leon Cruywagen</a>	<a href="#">View</a>
190	May 18	<a href="#">Karen A. Krieger</a>	<a href="#">View</a> <a href="#">Restore</a>
189	May 05	<a href="#">HEATHER B. MOORE</a>	<a href="#">View</a> <a href="#">Restore</a>
188	May 04	<a href="#">Scott S. Souder</a>	<a href="#">View</a> <a href="#">Restore</a>
187	May 03	<a href="#">HEATHER B. MOORE</a>	<a href="#">View</a> <a href="#">Restore</a>

### Speaker Schedule

City	Date	Venue	Host Welcome 8:50 -9:50	Keynote 8:55-9:50	X Web Experience 9:50 -10:50	W Work Experience 11:00 - 11:50	Collabora the Cloud 1:00 - 1:50
Columbus	April 4	Convention center OCLC	Jacqui Juergens/Professional Host Greg Schwem	Jack Welch	Steve Visconti	Kyle Farnand	Ted Brufke

# Social Networking & Microblogging

- “By 2014, social networking will replace e-mail as the primary vehicle for interpersonal communications for 20 % of business users”
- Gartner Feb 2010



# Micro-blogging: Asking for Help

Following  
Initiatives

Knowledge  
Accident

Custom  
Widget

Asking for  
Help  
based on  
Network

1 new invitation



[Show all \(570\)](#)

My Links

BlueThx (BETA Widget)

 Privacy: Pub

Give BlueThx now!

BlueThx received ▾

Nhlapo, P (Phumlani)

Hi Chris, just a BlueThx note for today's session "Live Social, Be Productive", On behalf of the South African ICS team, we are now part of your army of soldiers and we will spread the message.

Viewing 1-1 of 1 BlueThx received the past 60 days [See More](#)

[My BlueThx](#) | [BlueThx Community](#)

What are you working on right now?



**Crummey, Christopher C.** Presenting at AVIVA in London around our internal Social Business and showcasing our internal deployment Oct 4  
(2 comments)



**Lowry, A D (Alan)** Friday 4:40 AM

Chris, thanks again for your time and presentaion this week.....I am still getting great comments from Aviva staff about what they saw.



**Milcent, Pierre** Friday 10:01 AM

Hi chris, can tell me more about this session wiyth AVIVA ? We have a social business and IBM connections presentation with AVIVA in France on October 18th. Thanks

[Write another comment...](#)



**Crummey, Christopher C.** Presenting to BMO with Alistair and IBM Team Sep 30  
(1 comment)



**Quig, Robert (R.L.)** Oct 1

...and an excellent job of it you did too. Thanks!

[Write another comment...](#)



**Crummey, Christopher C.** Presenting in front of some very smart people at Excellus Sep 27  
[Add comment](#)



**Newcombe, Kevin (K.A.)** wrote Sep 26

Looking for some help, do we have expertise migrating customer from Jive to Connections

[Add comment](#)



**Crummey, Christopher C.** Working on a new demo for Social Business Sep 23  
[Add comment](#)

# Crowdsourcing: Open Product Development

## IBM Connections Idea Blog

[New Idea](#)

1 - 30 of 171

Page 1 | [2](#) | [3](#) | [4](#) | [5](#) | [6](#)

[Previous](#) | [Next](#)

Sort by: [Date](#) | [Title](#) | [Votes](#) | [Comments](#) | [Visits](#)

128

[Vote](#)

**Do you want to see folders within a Community**  
Simon Vaughan | Mar 30 | Tags: [apps\\_community\\_improvemen...](#) [community\\_improvements\\_fi...](#) | [13 comments](#) | [640 visits](#)  
One thing that our users have been asking for is 'Folders' within a community. Each folder should allow a user to determine who can access the files within the folder and would be a major plus point for the adoption of Connections in an organisation  
*Sep 25: Simon Vaughan edited this idea*

105

[Vote](#)

**Community Calendar**  
Colleen Walker | Mar 31 | Tags: [community\\_improvements\\_ge...](#) [apps\\_community\\_improvemen...](#) | [12 comments](#) | [514 visits](#)  
A calendar where you can post your meetings and events for the community.  
*Sep 25: Simon Vaughan edited this idea*

99

[Vote](#)

**Poll / Survey app in connections**  
Simon Vaughan | Mar 31 | Tags: [apps\\_new](#) [apps\\_others](#) | [10 comments](#) | [447 visits](#)  
In a future version of Connections, I would like to see a Poll / Survey app  
*Sep 25: Simon Vaughan edited this idea*

91

[Vote](#)

**Like and share buttons on Profile Updates**  
Toni Hintikka | Mar 31 | Tags: [activity\\_stream\\_improveme...](#) | [12 comments](#) | [376 visits](#)  
Our customers say that users will often compare Connections to Facebook. And At least Like button on profile updates would be nice.  
*Sep 25: Simon Vaughan edited this idea*

82

[Vote](#)

**The ability to mention someone in a status update and show this in thier activity stream / River of news (by a @username)**  
Simon Vaughan | Apr 1 | Tags: [activity\\_stream\\_improveme...](#) | [4 comments](#) | [147 visits](#)  
One thing that would be good would be to allow me to 'mention' someone in a status update (via the @username tag) and for the update to show in a users 'river of news' or 'activity stream'  
Socialcast does this quite well (via the @mention)

# Flatten Organization

## ▼ The Board

What are you working on right now?



**Crummey, Christopher C.** Presenting with Bart and Uffe at the SW ALW in Barcelona Today 3:18 AM

(1 comment)



**Suarez Rodriguez, Luis** Today 3:21 AM

Hi Chris! Great to see you last night shortly! Looking forward to your presentations later on & perhaps time to do a proper catchup! :-))

[Write another comment...](#)



**Crummey, Christopher C.** Loving the new W3 user experience. Type a person's name in the search bar at the top - Bingo you have profile search! Sunday 10:39 AM

(2 comments)



**Wright, Stephen F.** Sunday 5:34 PM

Chris, in the next couple of days we will enhance the search bar with a little easier interface to show whether you are searching w3 or Profiles. Reaction overall to the new w3 has been very positive. We do www.ibm.com with same design this week.



**Hall, Matthew J.** Sunday 7:28 PM

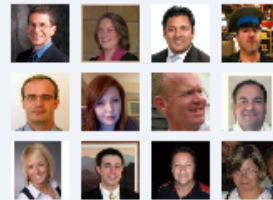
I, too, love the new W3 look-&-feel. Does the person search leverage Faces (<http://faces.tap.ibm.com/#>) technology? Hope the "Connect and Share" section becomes dynamic and updates automatically vs me having to hit the Ctrl+r key to refresh the page. Keep up the great work!

[Write another comment...](#)

[People managed](#)

## Network

2 new invitations



[Show all \(487\)](#)

## My Links

- Lotus Evangelist Knowledge Quickr
- LotusKnows Evangelist Community
- Request Central
- Collaboration Tiger Team World Wide (Lotus)
- Smarter Collaboration Demo
- My Bio & Photo
- LCTY London Keynote Demo

[Blogs](#)

[Profile](#)

[Activities](#)

[Bookmarks](#)



[Communities](#)

[Wikis](#)

[Files](#)



**Wright, Stephen (Steve) F.**

BT/CIO Vice President, Enterprise Solutions and Web Enablement

WESTFORD, MA United States

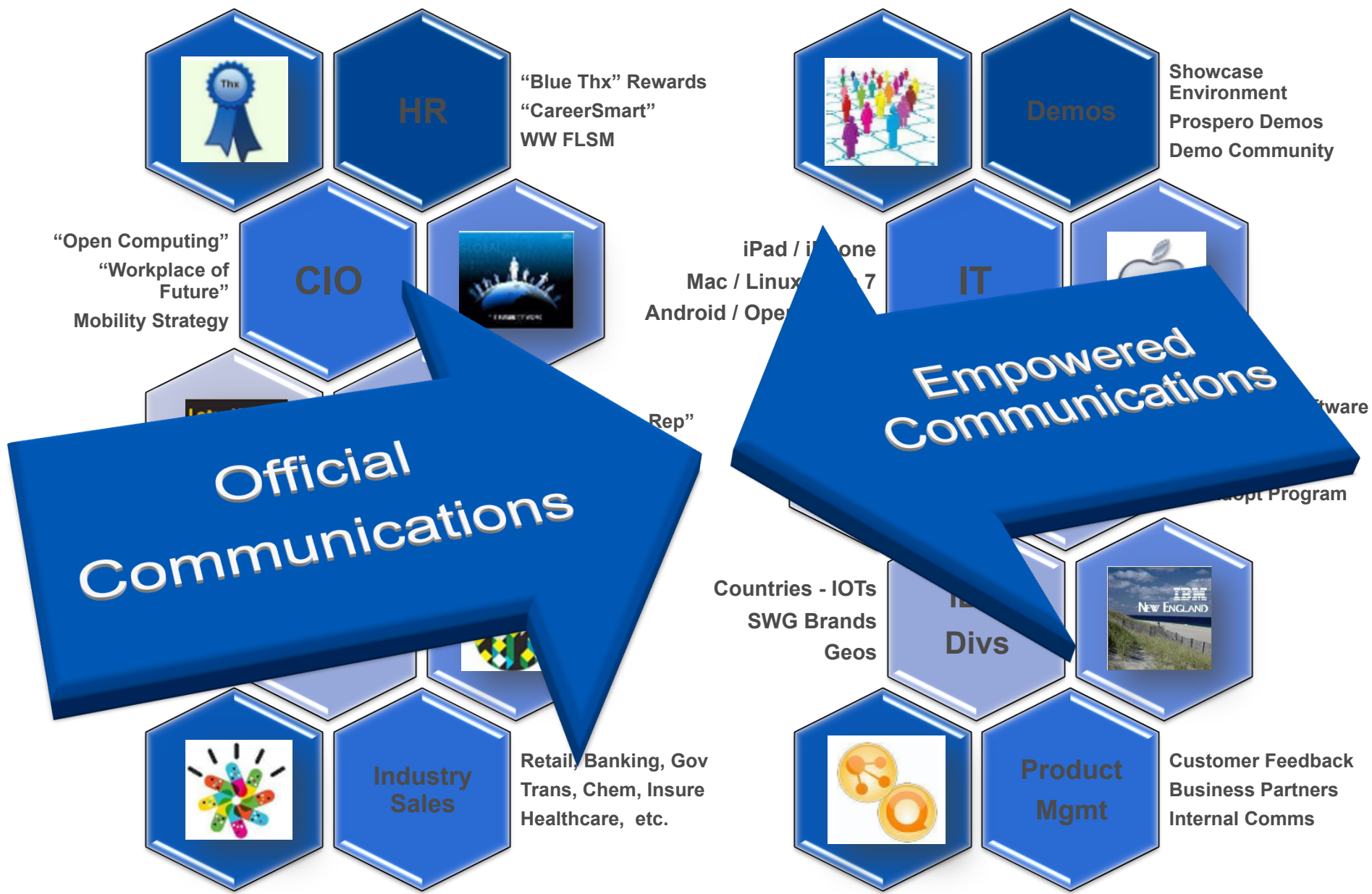
Building: WTF5 | Floor: 2 | Office: 2806

1-978-399-5045

[swright@us.ibm.com](mailto:swright@us.ibm.com)


[Send e-mail](#) | [More Actions](#)






# Human Resources


- Guide your teams to business and professional success
- Collaborate. Develop. Build.
- Learn how you can grow your career at IBM
- Driving Key HR Business Initiatives
  - Cross Generational Diversity
  - Perspectives on Leadership
  - Building a Culture of Innovation
- Give or get 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](#)



# Human Resource Examples

Women in Europe



Women in Europe


Overview

Members

Wiki

Discussion Forum

Overview



GreatWomenCommunity

Welcome to Women in Europe

With this launch we want to create an inspirational virtual community of all women in Europe.

This platform aims at providing you the opportunity to launch discussions or participate and share your experiences. You will receive encouragement from your colleagues.


We believe you will see this as an added value that you can leverage to build a strong personal network.

Reference Links:

IBM Great Women Community [wiki](#).

IBM Great Women Community [blog](#).

20K Members

 **10 Tips to Help You Make the Executive Ranks.**


Last post by [Reg Manzer](#) | Jun 10 | replies (4)

**Hiring Manager Checklist for Software 6-17-11.doc**

Updated Jun 17 by [Lori A. Clark](#)

☆ This file has not been recommended.

[Upload new version](#) | [Set properties](#) | [Notifications](#)



Description: This checklist is North America specific and has been d

Size: 181 KB

[Download this file](#)



## What to do when you're laid off? Network!

Monday, March 01, 2010 2:00:00 PM

I've just been told I'm a part of a "resource action" at IBM. My tentative last scheduled day is May 31, although it could be as early as March 31. Unlike some people put into this situation I would very much like to stay at IBM. Therefore I am holding this event to help my in my job search. Please, if anyone's heard of a job opening in one of the following areas, let me know. <br/> <br/>Information Technology <br/>Education <br/>Writing <br/>Technical Support <br/>Social Networking <br/>Systems Analysis <br/> <br/>I am also open to suggestions from those whom I've worked with. You all know I learn fast and well, am a good teammate, and have a very wide background so I can learn anything. I am willing to start at ground zero if necessary. I'm a self-starter; just point me in the right direction. <br/> <br/>Also, it is possible some of you are part of this resource action. If so please accept my condolences as well as my offer of help, no strings attached. If I know your work I'll be a reference; I'll also send along any information I have about prospective jobs. If I lose a job to a friend who is better at it than I am I am happy to help; I don't believe in competition for this sort of thing. You are all welcome to any news I may have.



Patricia Rowell  
1 Posts

## How can you make working in the office motivating for high performing teams?

May 24

On his May 23 SWG manager call, Robert LeBlanc talked about the benefits of teams working together in office fun and productive for your team?

[Reply](#)



NANCY GOULDER  
1 Posts

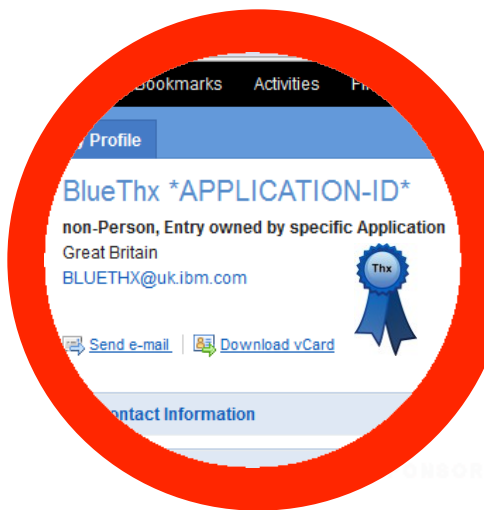
## How do you promote a culture of innovation? Any management best practices to share?

Mar 31

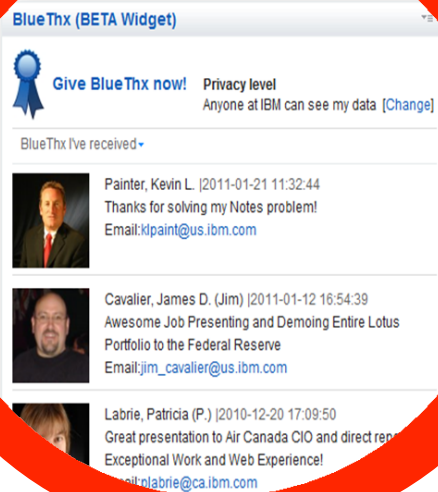
[Reply](#)

# BlueThx Initiative via Connections

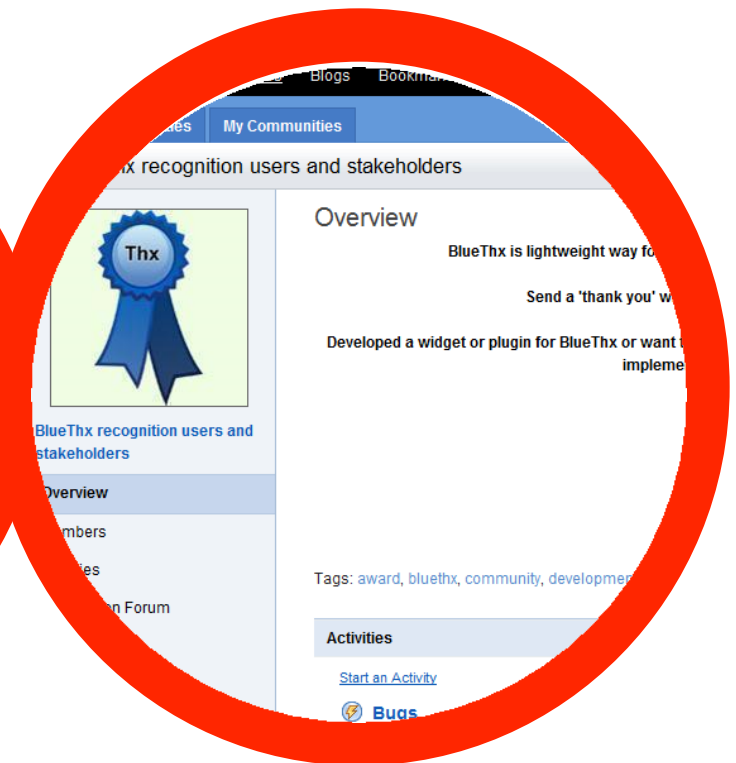
## Initiative as a Person



## Initiative as a Widget



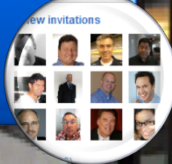
## Initiative as a Community



# Business value for IBM

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

## Expertise Location



- Global Portal
- Role Based Delivery
- Social & Mobile
- "2nd Trust Source"

## Experience



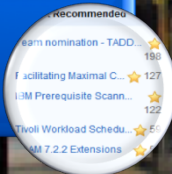
- Crowdsourcing
- Internal & External
- Prioritize features
- 3-4 months faster to market
- Technology Adoption Program

## Innovation



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

## Digital Reputation



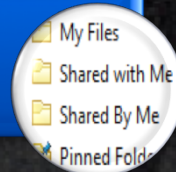
- Real Time Collaboration
- 50M IMs per day
- 2x every 3 years

## Real Time



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

## Wisdom of Crowds





The full research report, “From Social Media to Social CRM” and “CMO Study 2011” along with other industry leading thought leadership can be downloaded at :

<http://www.ibm.com/services/us/gbs/strategy/?lnk=mhse>





# Sugar on IBM: Deploy on Cloud / OnPremise



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

# Social business in the cloud

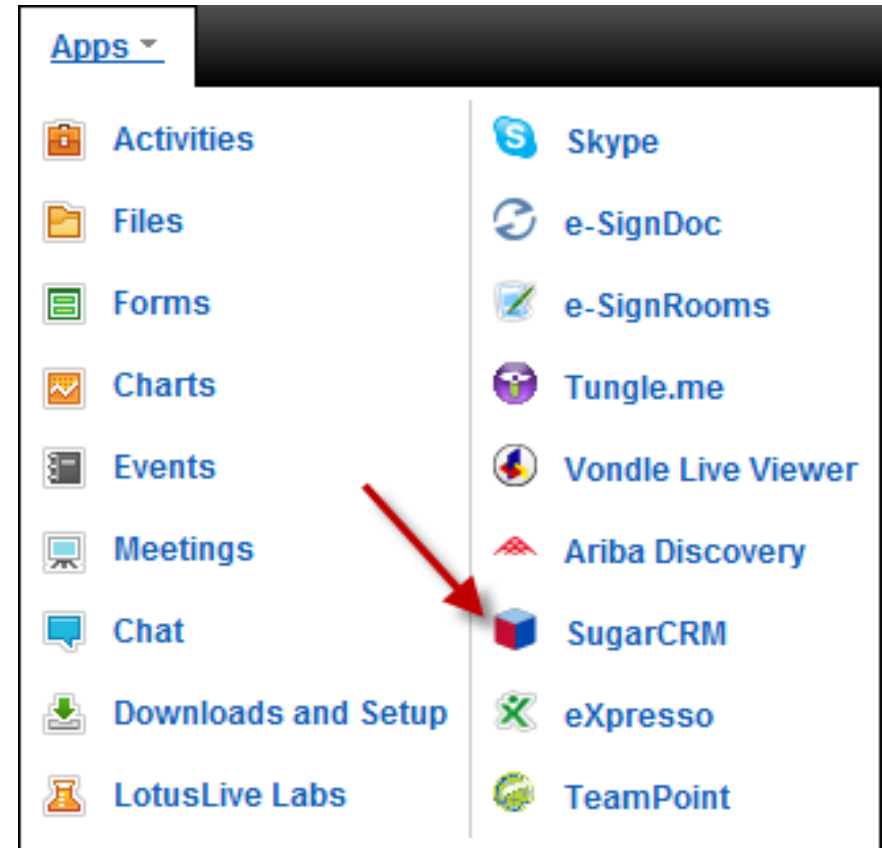
LotusLive™

and

 **SUGARCRM®**

- LotusLive is a social business platform that delivers cloud-based collaboration tools and social networking services
- Sales, marketing, and support professionals can engage with their prospects and customers more efficiently, resulting in shortened sales cycles and increased customer satisfaction and loyalty
- **SugarCRM for LotusLive** puts collaboration capabilities into the hands of SugarCRM users

<https://www.lotuslive.com/en/trialsugar>



- SugarCRM customers can receive a 90-day no-charge subscription to LotusLive Engage



LotusLive™

Solutions ▾

Services ▾

Support ▾

Join Meeting

Log In

Try LotusLive

About Us ▾

Business Partners ▾

Apps ▾

Demos ▾



Chat with Sales



Contact Sales

## Discover a New Way to Collaborate

Try complimentary trials of both IBM LotusLive Engage and SugarCRM and see how sweet collaboration can be.

Step1: Try Sugar

Step2: Try LotusLive Engage



## Sign up today

Try a 30 day, no-charge trial of LotusLive Engage and Sugar. Discover new ways to improve your collaboration with innovations in Social CRM and Social Business.

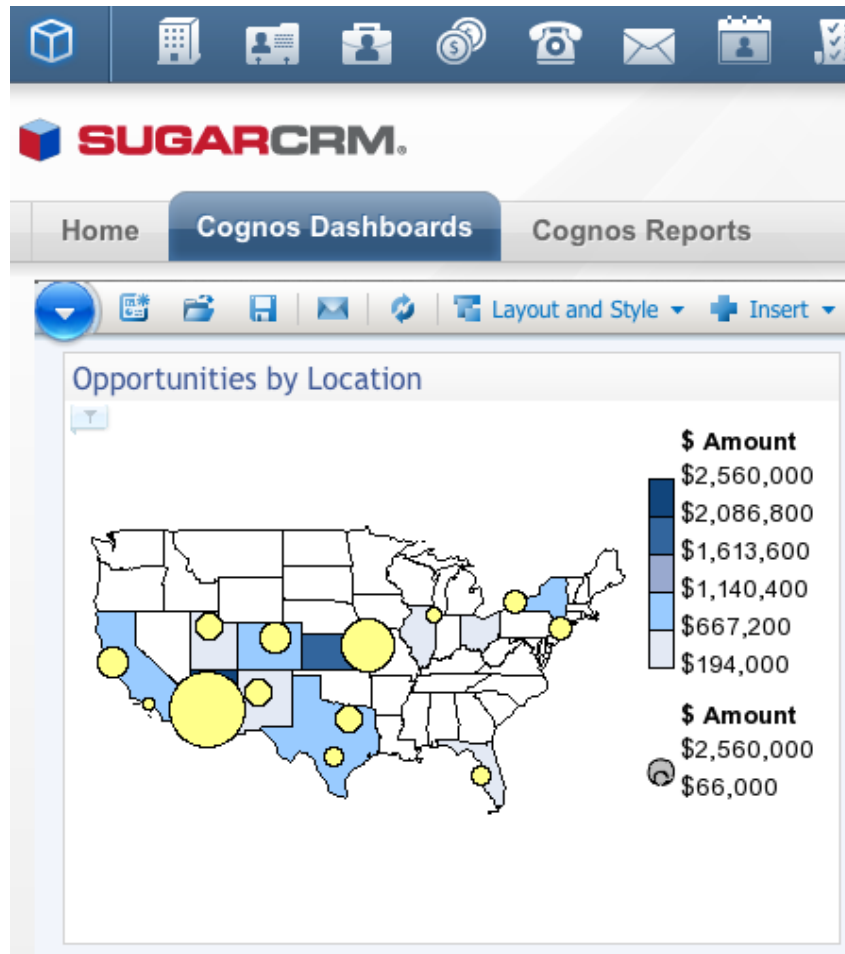
### Two Simple Steps

Sign up for both services today and see how LotusLive and SugarCRM can simplify your workday and improve collaboration with customers. Sign up for both services today in two easy steps:





# Sugar on IBM: Business Analytics and Optimization



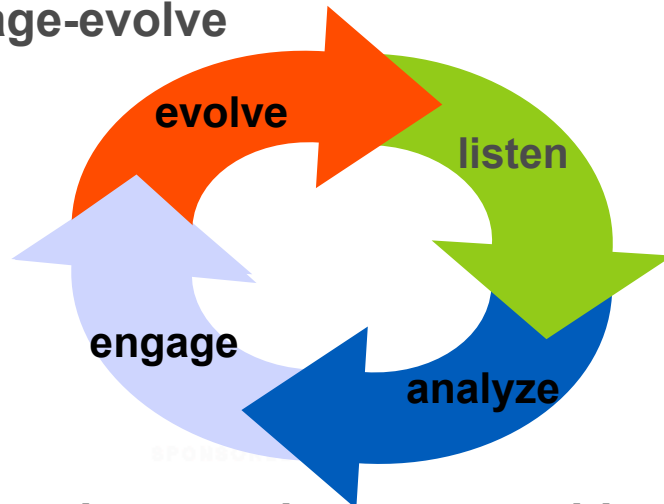
**with Cognos and SPSS**

- 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.
- 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 with Cognos
- Maximize ROI of marketing campaigns

## Mitigate risk and improve ROI with analysis, insights, and employee empowerment

A distinguishing feature of Social CRM is the practice of capturing and analyzing data from social media interactions to develop actionable insights that can be shared across the enterprise to reduce risk and improve all aspects of the customer relationship.

- **Use a continuous loop of listen-analyze-engage-evolve**



- **Let employees who engage with customers participate in the knowledge loop**
- **Pilot social media initiatives internally first**



# Sugar and IBM: Summary



- Freedom: Flexible deployment models
- Collaborate
- Control: IT keeps control over deployments
- Leverage: Integrate with your existing environment
- For more info:

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

# Overview

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

**Erin Fetsko, Principle Sales Engineer, SugarCRM**



# SOCIAL CRM

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

SPONSORED BY



SUGARCRM.



# 360 Degree View of the Customer

## Traditional CRM Activities

- Customer Support
- Marketing
- Sales

## External data sources

- ERP
- Billings
- HR



SPONSORED BY

## Social Media Networks

- Facebook
- Twitter
- LinkedIn

# You will see Social CRM in Action:

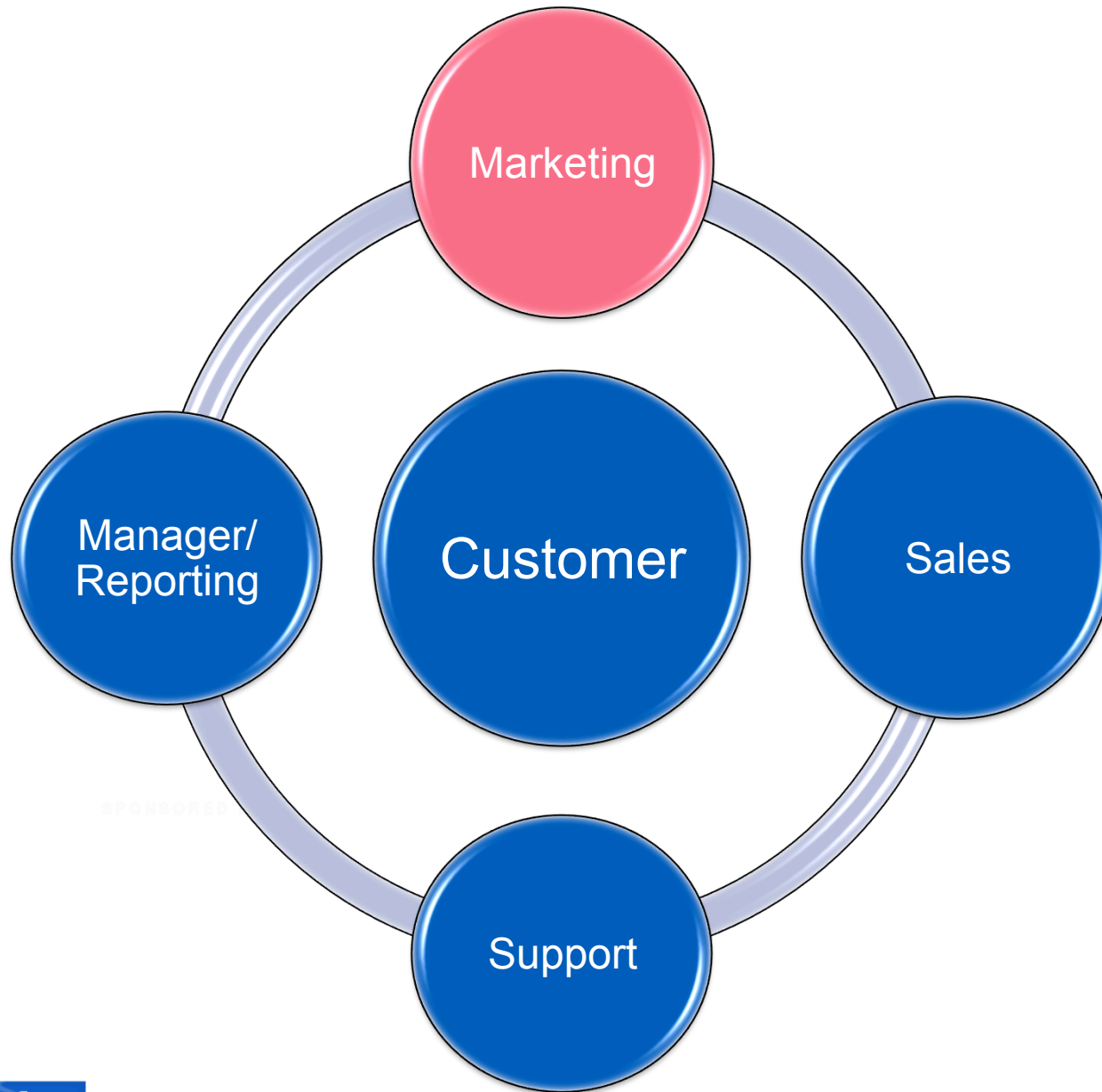
- **Flexible** with easily configuration around processes
- **Intuitive** and easy for ends users to use & configure
- **Open** and integrated with IBM and 3rd applications
- **Global** and available in 25 languages
- **Mobile** with access from any smartphone and tablet
- **Social** with activity streams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

SPONSORED BY

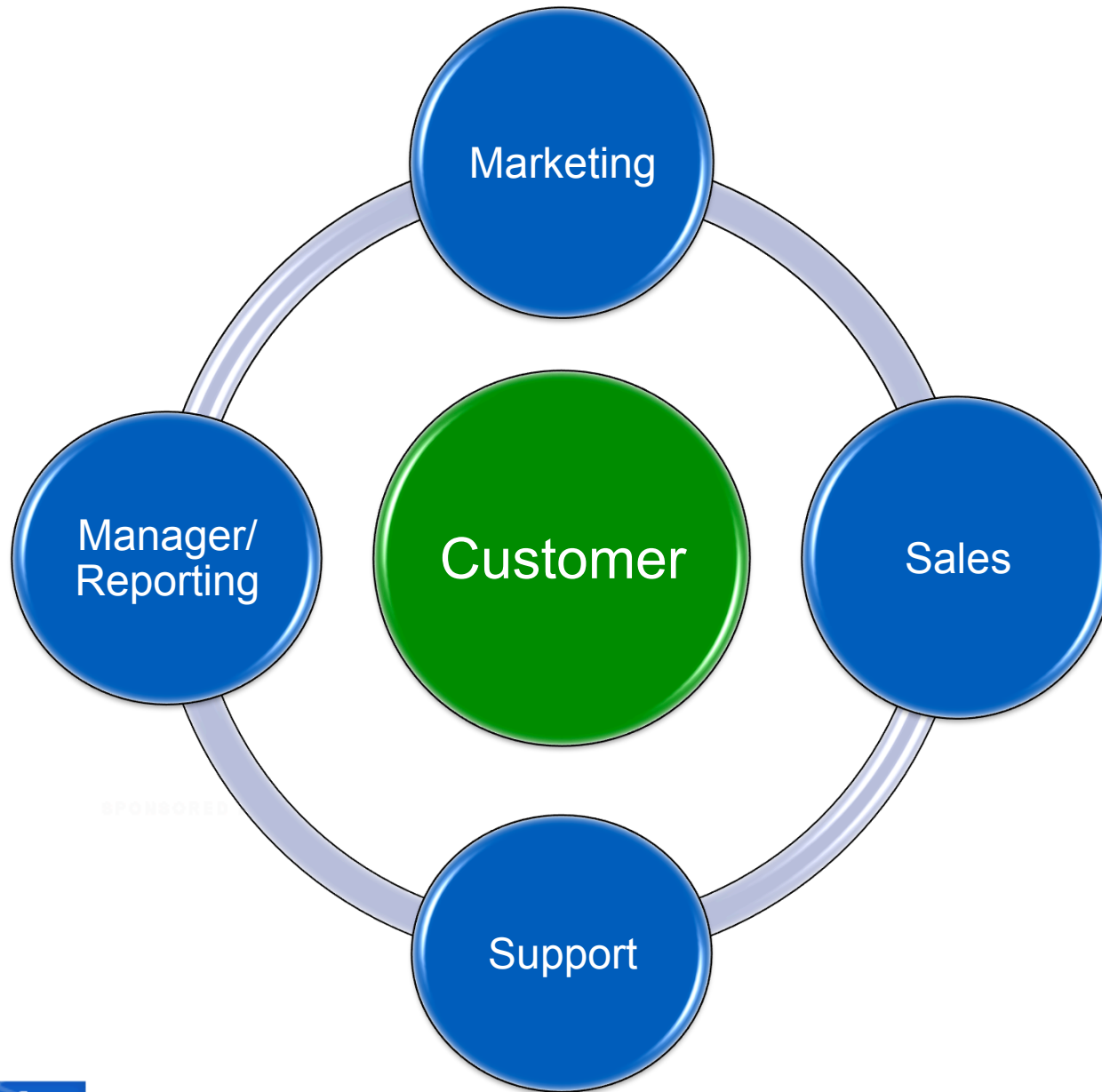




# Marketing Creates a Campaign



# A Prospect Responds



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# Sales Works the Lead

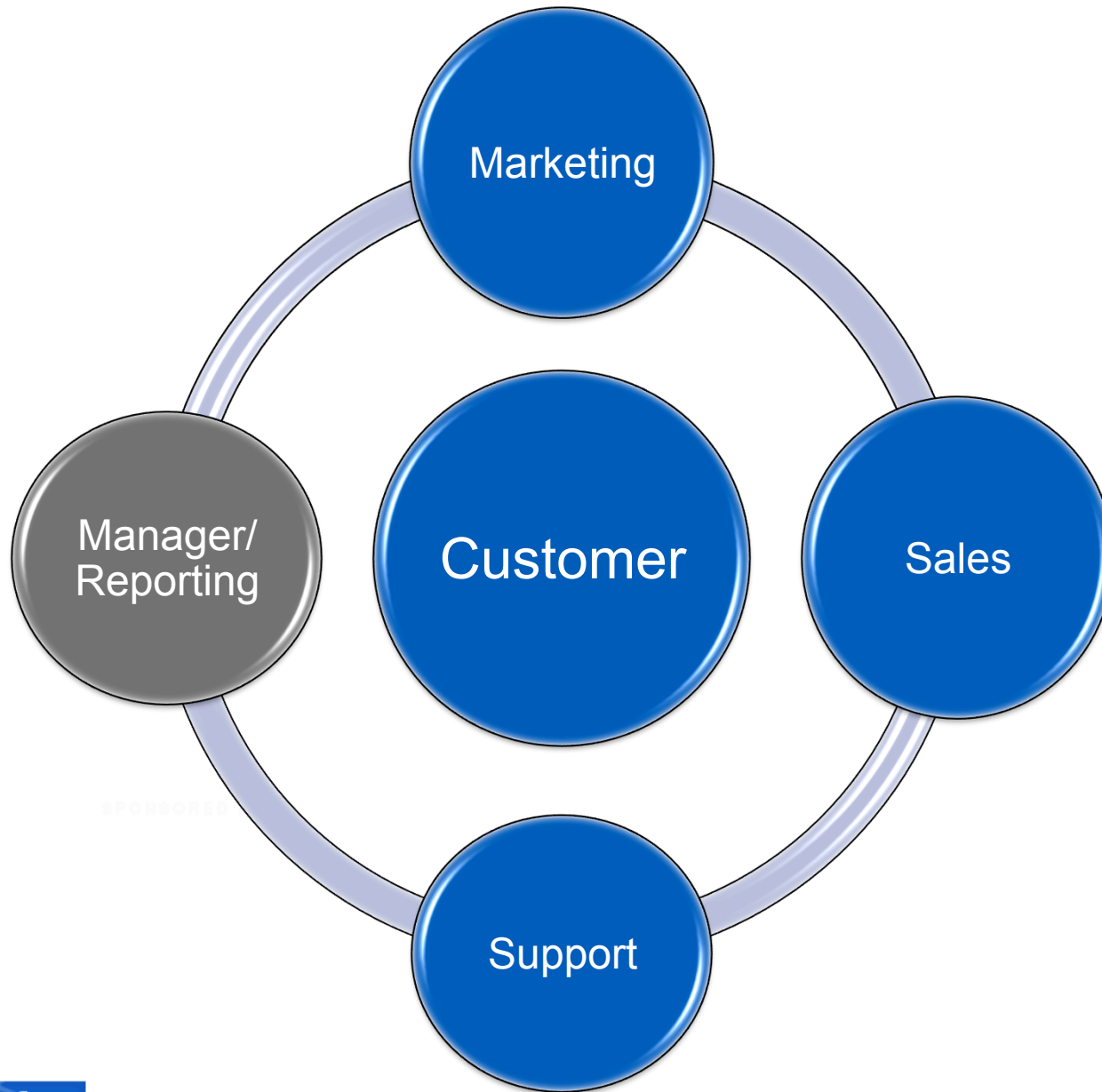


SPONSORED BY

# Sales and the Prospect Interact Socially



# Management Views the Forecast



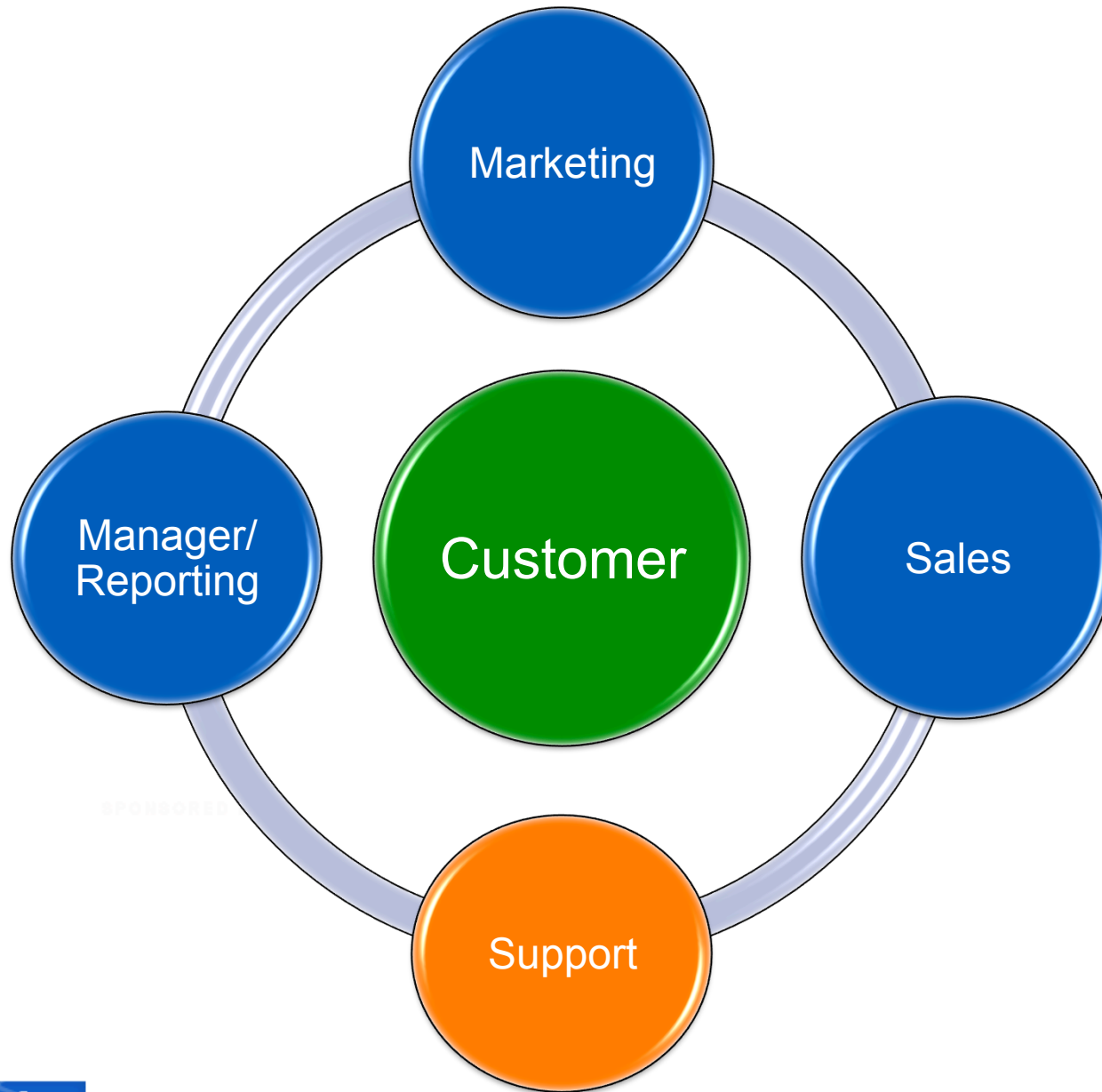
SPONSORED

# Warm Handoff to Customer Support

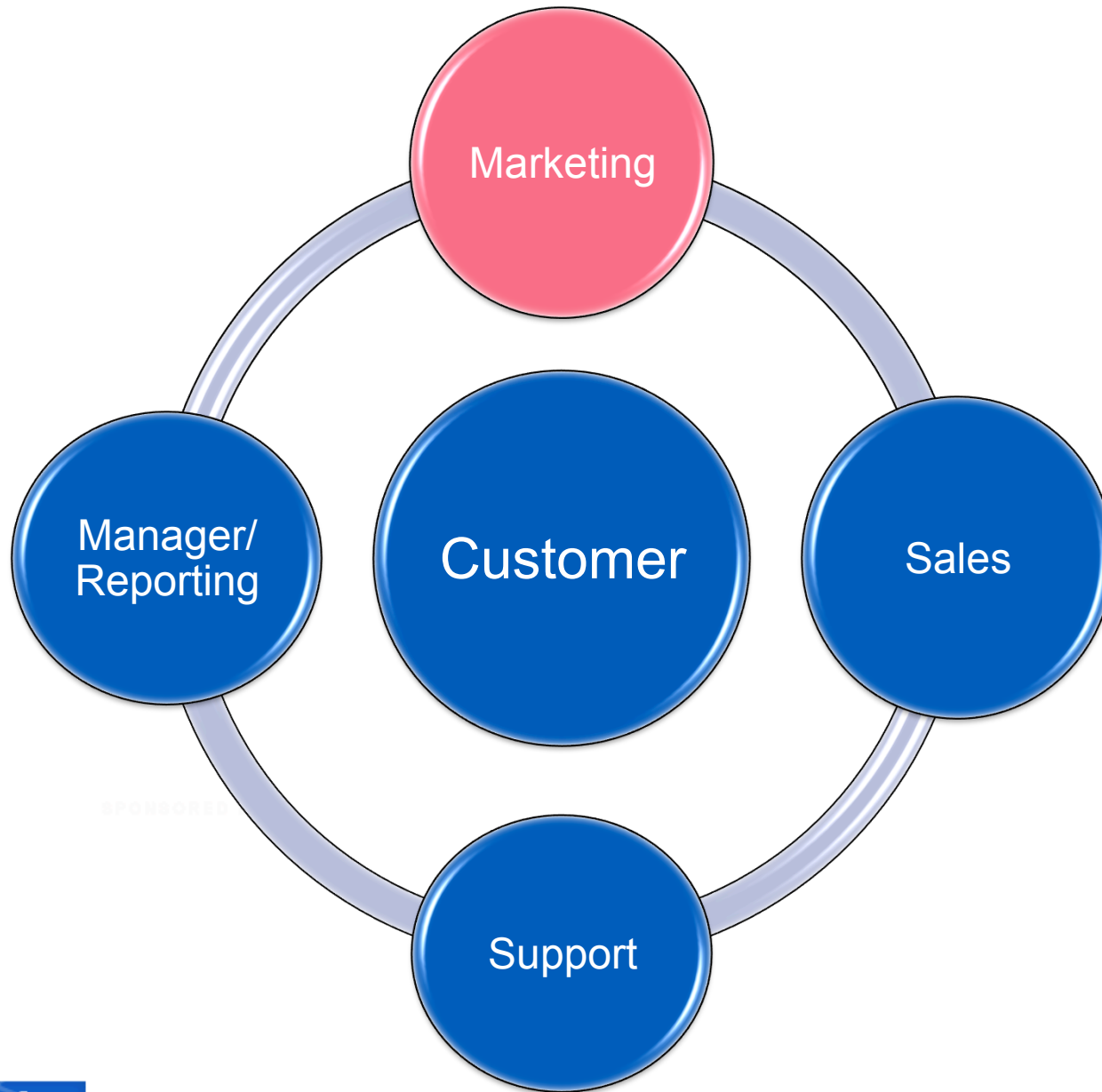


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# The Customer Opens a Support Ticket



# 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
  - » Overview
- » SugarCRM
  - » Products
- » More about
  - » SugarCRM
- » FAQ
- » The News
- » Web Links
- » News Feeds

### Resources


- » SugarCRM
  - » Home
- » 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

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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

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More ▾

Welcome to

**SUGAR ENTERPRISE.**

Please enter your user name and password.

User Name:

Password:

Language:



Log In



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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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SUGARCRM.





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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Language:

English (US) ▼

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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

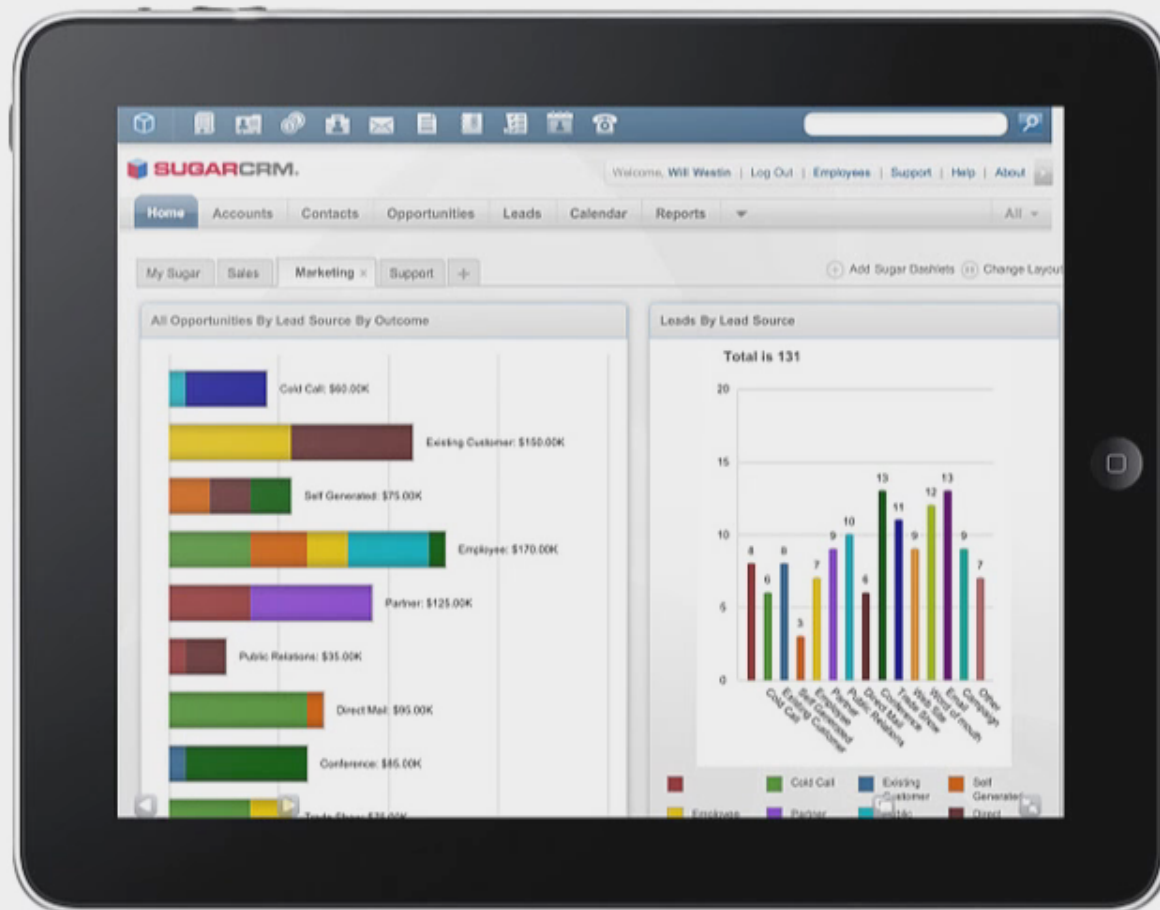
# Mobile and Social

- 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



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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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- » More about SugarCRM
- » FAQ
- » The News
- » Web Links
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## Resources

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User Name:

Password:

[New user? Please register](#)

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**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

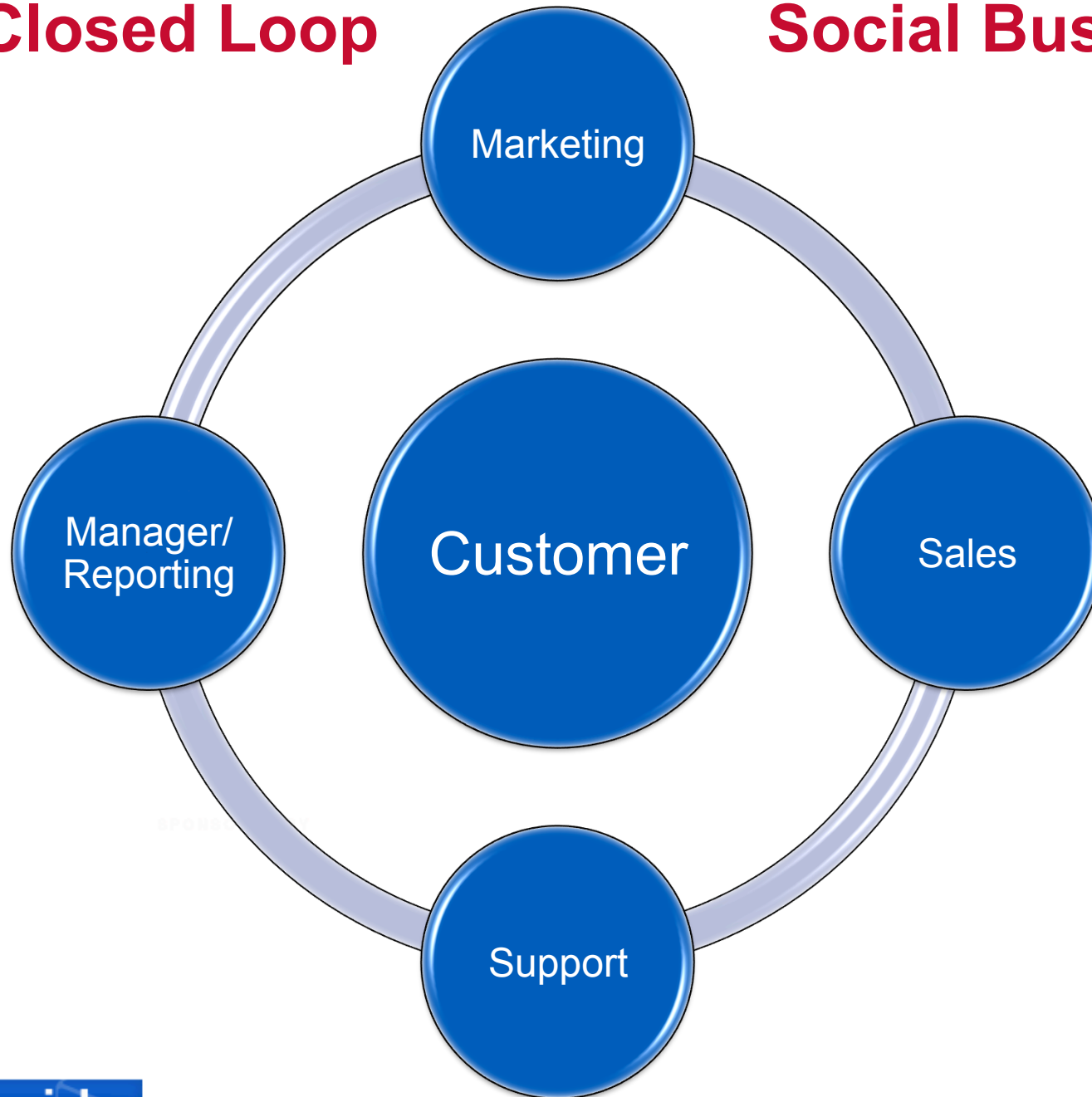
▲ Tracker URLs

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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# Questions and Answers

