

Agenda

10:00 - 10:10	Begrüßung	Mirco Müller, Geschäftsführer, Insignio CRM GmbH
10:10 - 10:35	Die neuen Regeln des Social Media	Tom Schuster, VP & GM EMEA, SugarCRM
10:35 - 11:15	Von Social Business zu Social CRM	Tony Wehrstein, Lotus Consultant, IBM
11:15 - 11:45	Hiermit sollten Sie starten!	Tom Schuster, VP & GM EMEA, SugarCRM
11:45 - 12:15	Pause	
12:15 - 12:45	Kunden berichten über ihre Erfahrungen	Raik Brauns, Online Sales & Marketing Manager Global, 3Dconnexion GmbH
12:45 - 13:20	Live Demo: A Day in the Life of a Social Business	Mirco Müller, Geschäftsführer, Insignio CRM GmbH & Andrey Andreev, Technical Manager EMEA, SugarCRM
13:20 - 13:30	Fragen und Antworten	



A world map with a dark blue background, overlaid with numerous small, light blue dots representing global locations or data points.

Social Business and Social CRM

Tom Schuster
General Manager

SugarCRM Europe, Middle East, Africa



Social Business

GETTING STARTED

- The essential characteristics
- Getting started
- A live example
- Recommendation

Customer Service \equiv Marketing = Sales

[Start a Chat](#) [Send an Email](#) [Sales: 1-800-961-2888](#)

COMPANY

MANAGED HOSTING

CLOUD HOSTING

EMAIL & APPS

CLOUD BUILDERS


[Hosting Solutions](#) [Why Rackspace](#) [Partner Program](#) [Information Center](#) [Blog Community](#) [Hosting Knowledge](#)

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It's really what makes
us, well, us.

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RACKER
since: 2005



Racker →

→ *Hosting Solutions*

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

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CLOUD HOSTING
On-demand, scalable, application, storage & web hosting, supported 24x7x365 by Cloud hosting experts.
[More about Cloud Computing](#)
NEW! Managed Service Level Now Available

LEARN MORE

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

Start With the Customer



Start with
the customer



Put the customer at the center



Customer Relationship Management

CRM is about **Customers**

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

Enable the sales edge

INNER CORE

SALES EDGE

CUSTOMERS

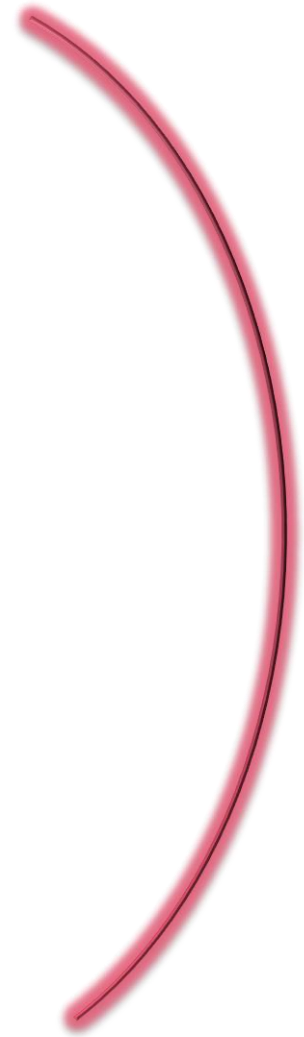


SALES

CUSTOMER
SERVICE

CALL CENTER

MARKETING

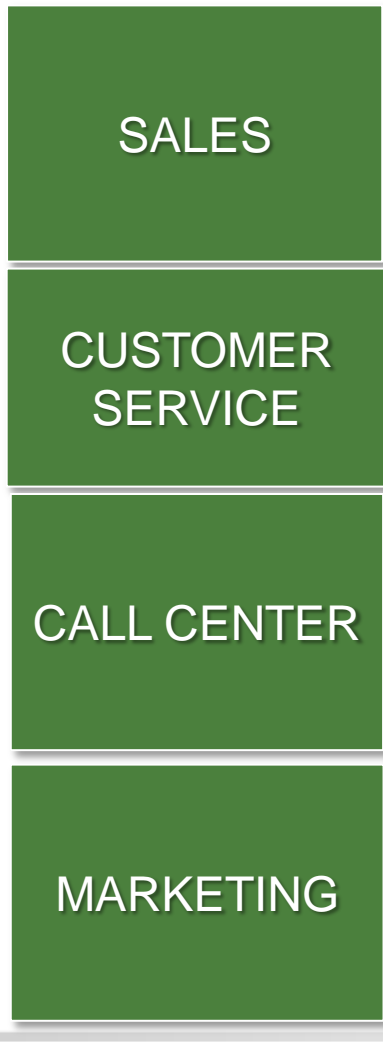


Introducing Social CRM



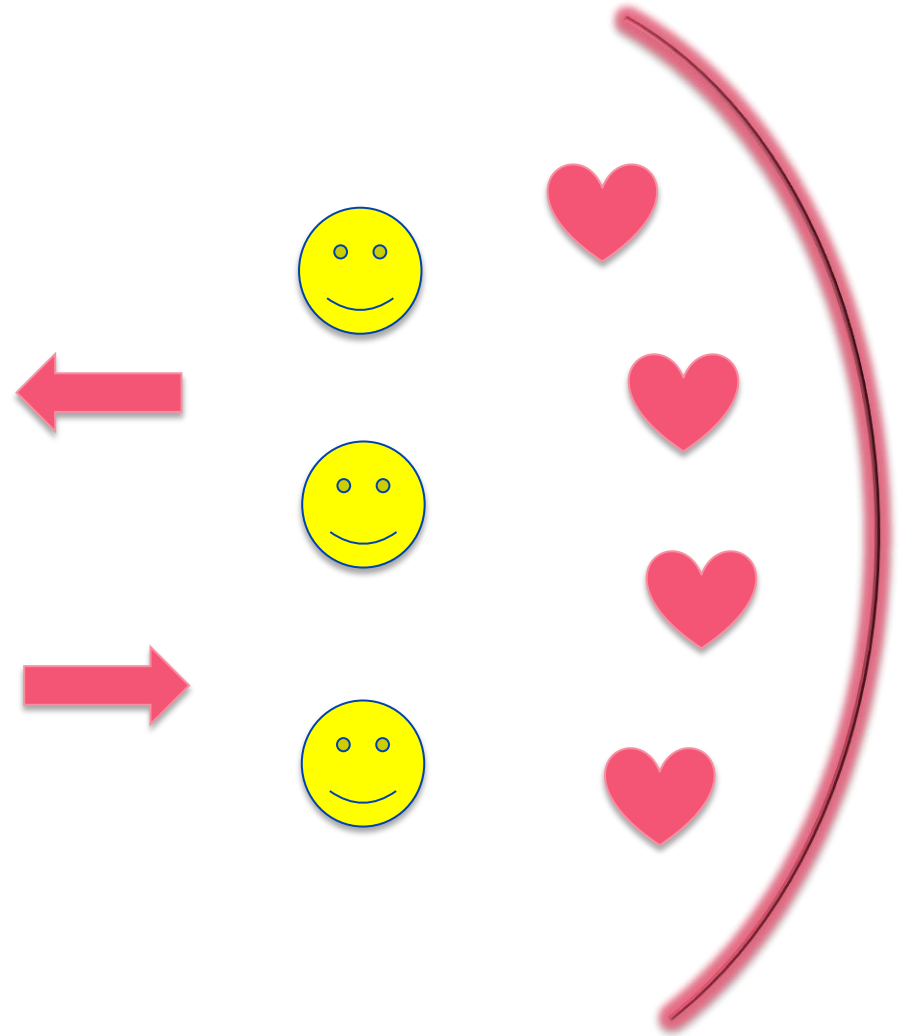
CRM Made Social: Enable the customer edge

SALES EDGE



PARTNERS

CUSTOMERS



Social CRM



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

©2010 CHESS MEDIA GROUP

Successful CRM is CRM Made Simple

CRM Made Simple

Social CRM

Intuitive

Open

Flexible

6 Steps to Getting started with Social CRM

Step 1: Implement an Open CRM System

Step 2: Customize the user interface and processes

Step 3: Integrate the essential back end systems

Step 4: Implement a flexible infrastructure

Step 5: Provide collaboration tools

Step 6: Use the Social Tools of choice

Getting started with Social CRM

Social CRM

Step 1: Implement an Open CRM System

Step 2: Customize the user interface and processes

Step 3: Integrate the essential back end systems

Step 4: Implement a flexible infrastructure

Step 5: Provide collaboration tools

Step 6: Use the Social Tools of choice

Open

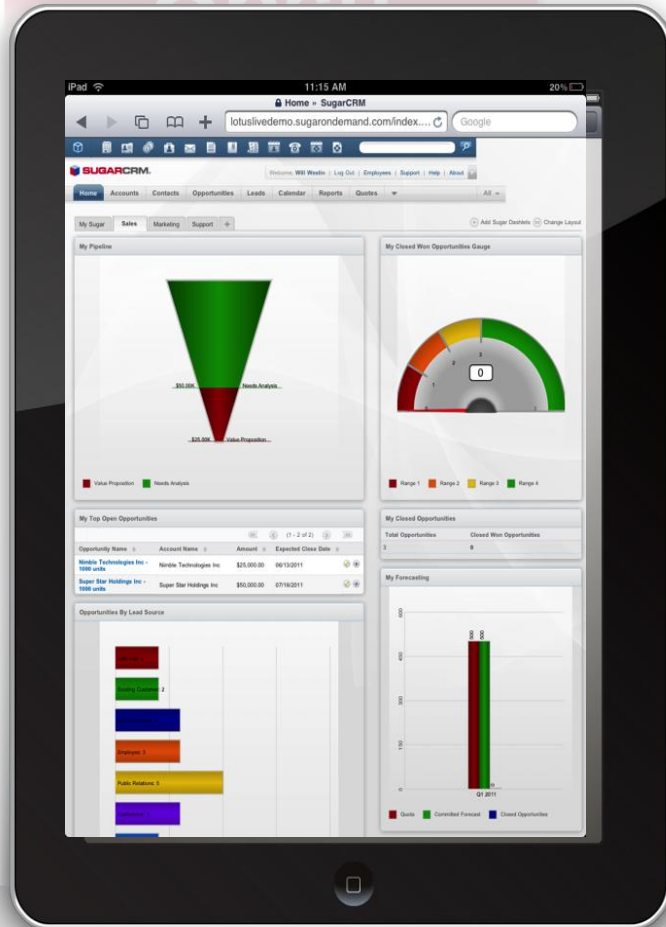
Social CRM

Technology

- Open Systems
- Users Have Control
- Web Standards
- Reasonable, predictable cost

Community

- Hundreds of Extensions
- Qualified Partners



Getting started with Social CRM

Social CRM

Step 1: Implement an Open CRM System

Step 2: Customize the user interface and processes

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Step 4: Implement a flexible infrastructure

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Step 6: Use the Social Tools of choice

Intuitive

Social CRM



For Users

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

For Administrators

- Simple Customization
- Seamless Upgrades

Getting started with Social CRM

Step 1: Implement an Open CRM System

Step 2: Customize the user interface and processes

Step 3: Integrate the essential back end systems

Step 4: Implement a flexible infrastructure

Step 5: Provide collaboration tools

Step 6: Use the Social Tools of choice

360 Degree View of the Customer

CRM Activities

- Customer Support
- Marketing
- Sales



INTERNAL data sources

- ERP
- Market Data
- HR
- Product



Specialized Tools

- Web Analysis
- Business Intelligence
- Statistics



External Data Sources

- Linked-In
- InsideView
- Hoovers



IBM and SugarCRM Integrated Offerings

Cognos.
software



Connections
LotusLive
LotusNotes



IBMSmartCloud



IBM Global Business Services
The right consulting partner to thrive in a complex world

- Integrate with
 - Cognos for BI
 - SPSS for advanced analytics
 - Unica for Marketing automation
 - LotusLive for collaboration
 - Connections for collaboration
 - Lotus Notes for email
 - CastIron for web integration
- Deploy in the cloud
 - IBM SmartCloud Enterprise
- Deploy on-premise
 - Series i
 - Series p
 - Series x
- Database DB2
- Services from IBM GBS



Getting started with Social CRM

Step 1: Implement an Open CRM System

Step 2: Customize the user interface and processes

Step 3: Integrate the essential back end systems

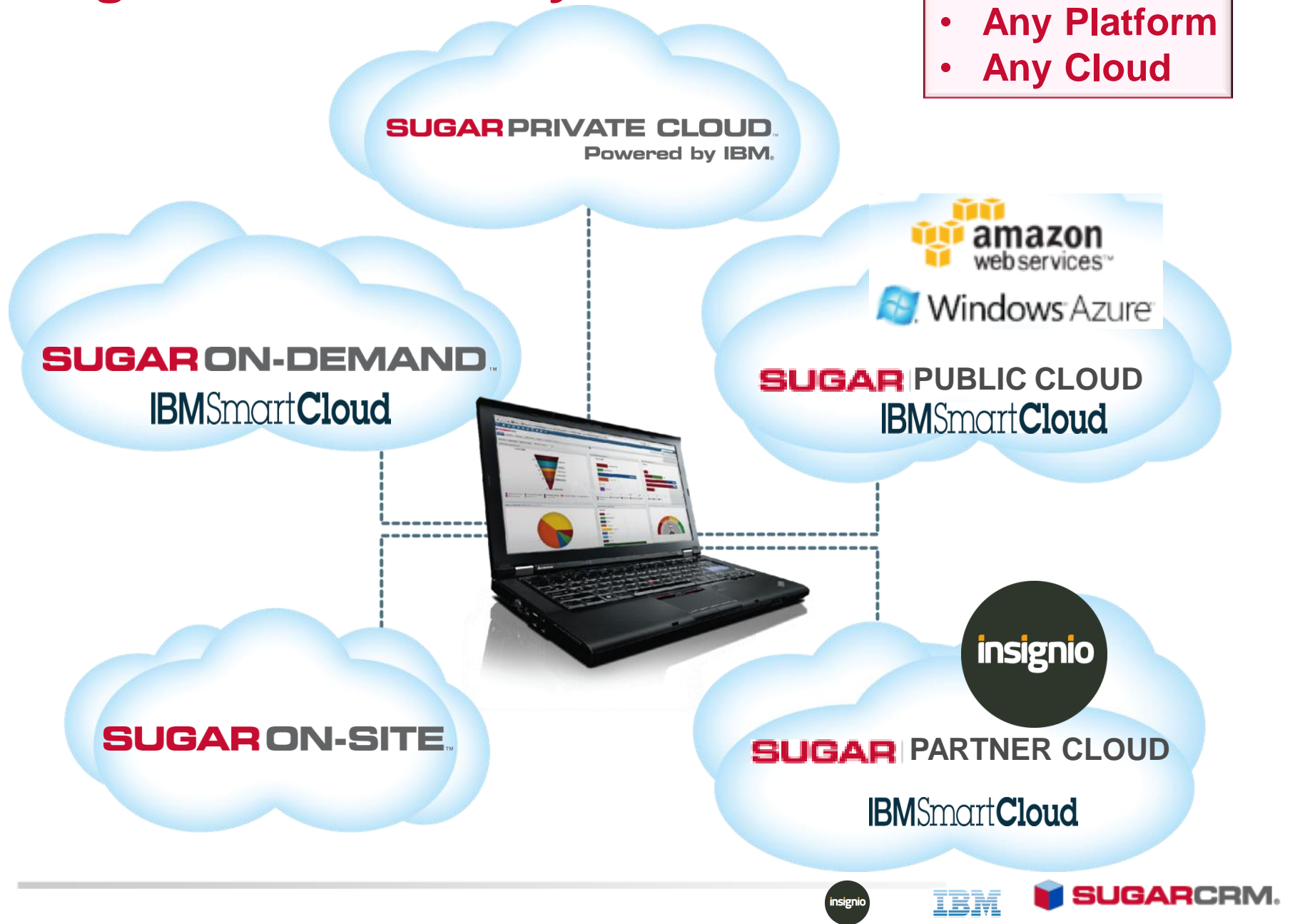
Step 4: Implement a flexible infrastructure

Step 5: Provide collaboration tools

Step 6: Use the Social Tools of choice

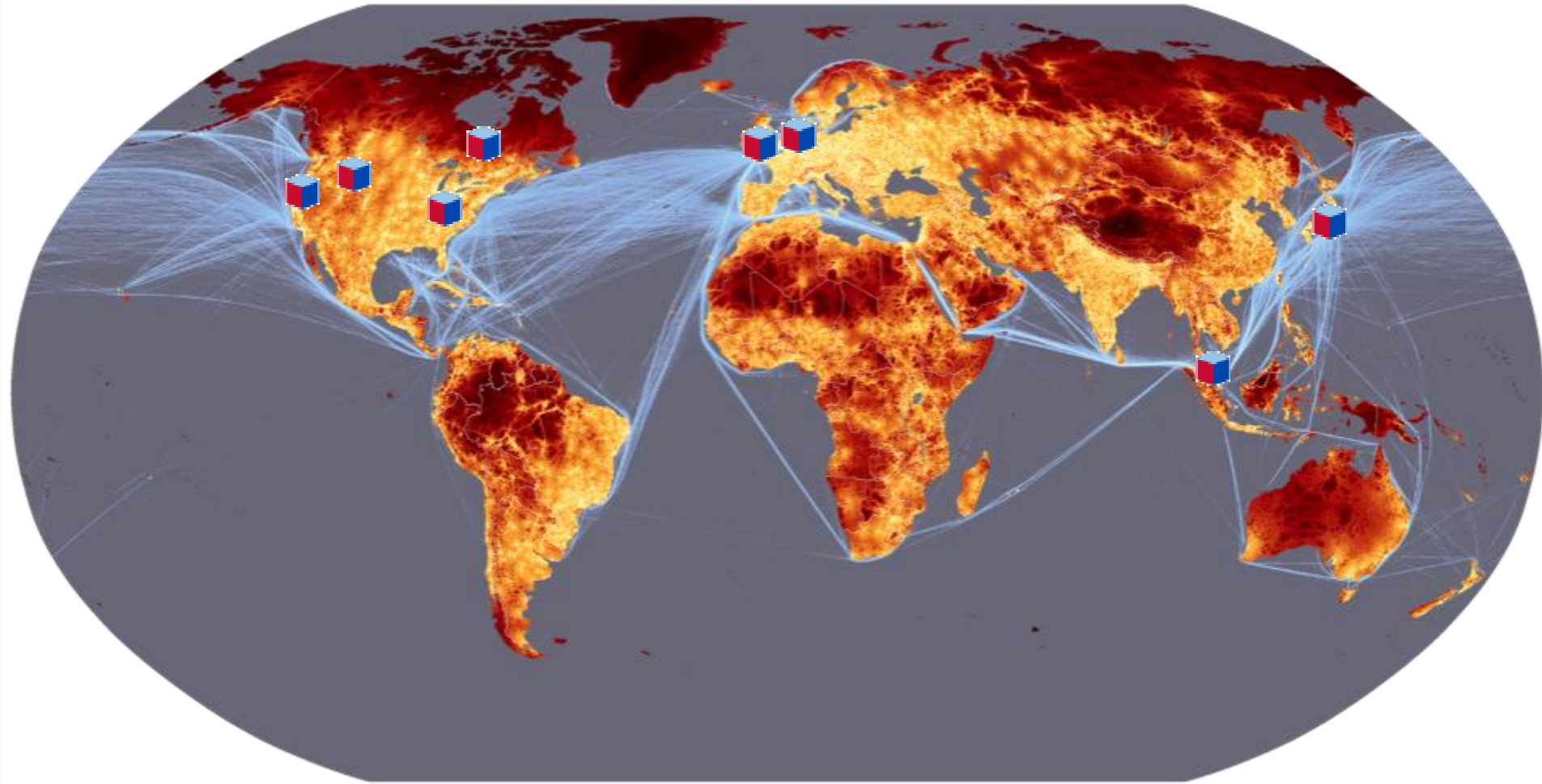
SugarCRM: Run Anywhere

- Any Device
- Any Platform
- Any Cloud



Expands SugarCRM's Global Reach

Sugar On-Demand + Sugar on IBM SmartCloud Enterprise



Getting started with Social CRM

Social CRM

Step 1: Implement an Open CRM System

Step 2: Customize the user interface and processes

Step 3: Integrate the essential back end systems

Step 4: Implement a flexible infrastructure

Step 5: Provide collaboration tools

Step 6: Use the Social Tools of choice

Step 5: Provide collaboration tools



Collaboration

Conferencing

Getting started with Social CRM

Social CRM

Step 1: Implement an Open CRM System

Step 2: Customize the user interface and processes

Step 3: Integrate the essential back end systems

Step 4: Implement a flexible infrastructure

Step 5: Provide collaboration tools

Step 6: Use the Social Tools of choice



Twitter Feeds on Your Dashboard

Latest Headlines honey-b honey-g SugarCRM SugarCRM Forums Internal Wiki VPN Gmail SFGate Getting Started Sugar Documentation Admin

Module Builder » Administratio... Create » Accounts » Honey-B S... Studio » Administration » Hone... Home » SugarCRM

SUGARCRM. Welcome, Administrator | Log Out | Employees | Admin | Support | Help | About

Home Accounts Contacts Opportunities Leads Calendar Reports Quotes All

My Sugar Sales Marketing Support Tracker + Add Sugar Dashlets Change Layout

My Twitter Feed

Martin Schneider Calling all #crm and #scrm analysts - DM me for info about SugarCRM analyst day in SF on first day of SugarCon
1 Hours 4 Minutes ago

Martin Schneider Have you checked out the #scrm track at SugarCon yet? Amazing series of speakers - DM me for social media discount code! <http://ht.ly/4e6Db>
1 Hours 32 Minutes ago

Jan Sysmans The Jan Sysmans Daily is out! <http://bit.ly/htNnYf> ▶ Top stories today via @leightontjp @asaunders @nprpolitics @scratchex
3 Hours 55 Minutes ago

Angel Magaña Load times for Java apps remind me of load times for Commodore 64 apps.
12 Hours ago

Jan Sysmans The Jan Sysmans Daily is out! <http://bit.ly/fnx7eF> ▶ Top stories today via @mjayliebs @jweinberger @mikemylen @accentgold
Yesterday

Jan Sysmans The Jan Sysmans Daily is out! <http://bit.ly/htNnYf> ▶ Top stories today via @scratchex
2 Days ago

My Calls

(1 - 5 of 50)

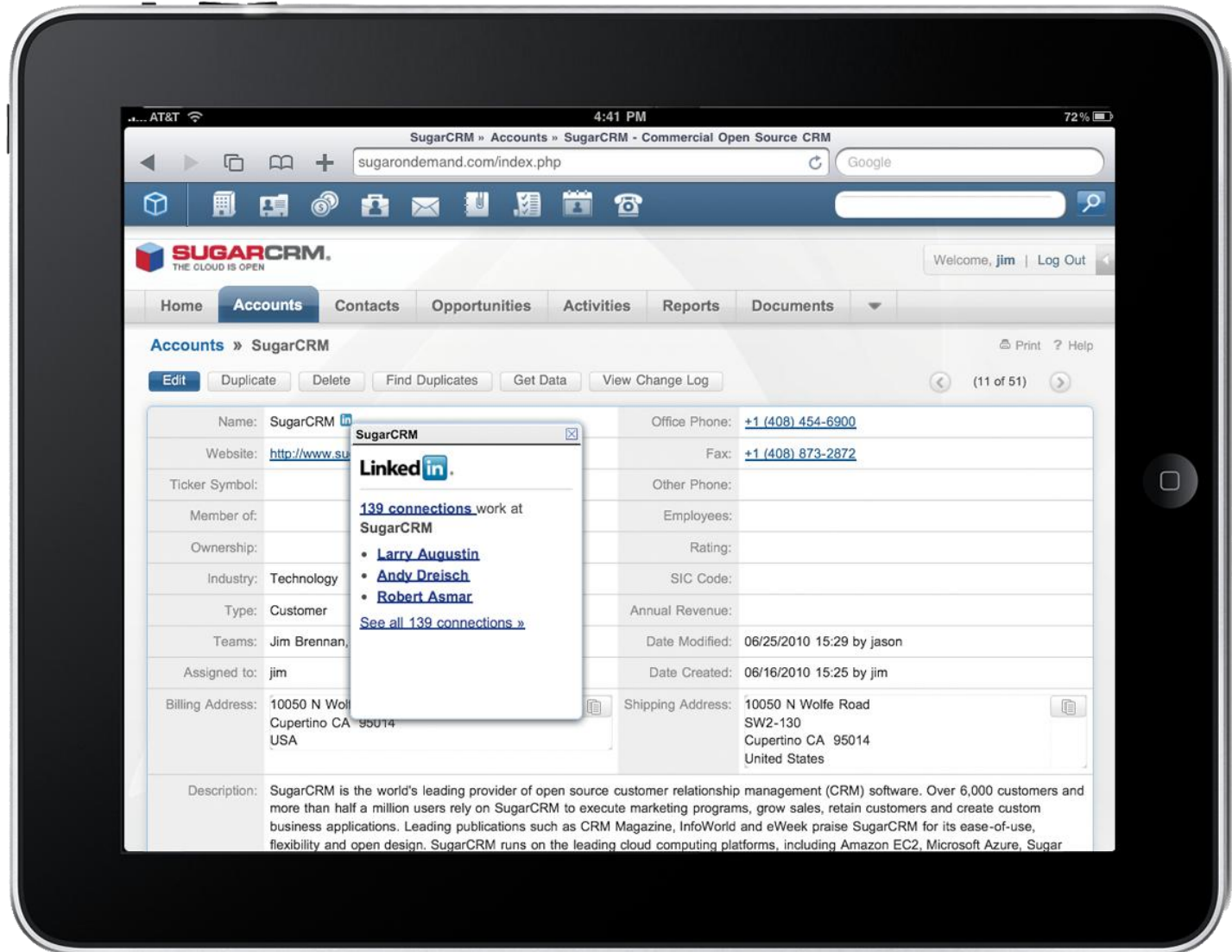
Close	Subject	Related to	Start Date	Status	Accept?
x	Left a message	X-Sell Holdings	11/07/2011 05:45am	Planned	
x	Bad time, will call back	Union Bank	10/03/2011 12:15am	Planned	
x	Left a message	Complete Holding	03/20/2011 11:30am	Planned	
x	Discuss review process	Bay Funding Co	03/05/2012 08:30am	Planned	
x	Get more information on the proposed deal	Kaos Trading Ltd	01/17/2012 06:45am	Planned	

My Meetings

(1 - 5 of 66)



LinkedIn Accounts





Google Maps integration

SugarCRM » Accounts » SugarCRM – Commercial Open Source CRM

http://demo.sugarondemand.com/jsysmans_vert/seed1/GMSdemo/index.php?module=Accounts&action=DetailView&reco

SugarCRM » Accounts » SugarCRM...

SUGARCRM. Welcome, Jim | Log Out | Employees | Admin | Support | About

Home Accounts Contacts Opportunities Activities Reports Documents Bug Tracker RSS Projects All

» SugarCRM

Edit Duplicate Delete Find Duplicates Get Data View Change Log

Basic Location

Google Map: jsysmans@gmail.com | My Profile | New! | My Account | Help | Sign out

Google maps 10050 N Wolfe Road,Cupertino,CA,95014,USA Search Maps Show search options

Print Send Link

Traffic More... Map Satellite Earth

Map showing the location of 10050 N Wolfe Road, Cupertino, CA, 95014, USA. The map displays the surrounding area, including streets like N Wolfe Rd, N Tantau Ave, and Stevens Creek Blvd. Key landmarks such as Square Shopping Center, Portal Plaza Shopping Center, and Jenny Strand Park are visible.

Done



Question:

What is the Social CRM interface of the future?

Answer:

The **social networking** site of choice

combined with

An **open** CRM system



Hillel Is Doing this Today



● Hillel Requirements

- Identify and engage students across universities in US
- Engage students where they “live”
→ Facebook
- Track all interactions in one relationship management tool

● Results

- 1000% increase in student participation


Hillel Uses Social CRM to Connect with College Students

facebook


18

Search

Steve Kaz Home



Hillel: The Foundation for Jewish Campus Life




REACH
Relationship Management


REACH Login


Username:


Password:


Login




Steve Kaz is using REACH. about a minute ago


Alex Martinowsky used CPI ACC Championship Giveaway. 8 hours ago


Michelle Yeager used Game Gift Finder. 11 hours ago

Laura Ruff used Your Perfect Plate Quiz. 15 hours ago

Steve Kaz used REACH Training. 16 hours ago

Sponsored Story See All

Rob Gustafson used Are YOU Interested?

Are YOU Interested?
Use

Add additional fields before saving to Sugar

facebook



Search



My Contacts

My Events

Logout of REACH

+ Add Friends

My Engagees



Eric Aarons



Dave Adam



Joan Arkins



Ethel Kasinetz



Stephen Kazman

Kathy Allen

Kathy Allen

Kristi Amdur

Lori Arce

Bruce Aronow

David Artman

EJ Asbury

Dan Ascher

Shane Aubrey

Craig Avena

Cari Aves

Susan Axon

Cara Baggett

Marcel Bakx

Deborah Baldwin

Richard Baldwin

Sue Balfus

Julie Bane

Amanda Barcus

Kimiko Barkley

Cara Barr

ew/Create Interactions

ew/Create Interactions

ew/Create Interactions


View/Create Interactions

View/Create Interactions

Enter Friend Details in Facebook

Enter Friend Details

+ Add Friends



Kathy Nikki Allen

First Name: *

Kathy

Last Name: *

Allen

Email Address:

kathy123@gmail.com

University:

South Harmon Institute c



Expected Graduation Year:



2011|

Continue

Cancel


Add people from Facebook to Sugar

facebook  18 

 **Hillel: The Foundation for Jewish Campus Life**
 **REACH**
Relationship Management


My Contacts **My Events**

Logout of REACH




+ Add Friends


My Engagees

**Eric Aarons**


View/Create Interactions

**Dave Adam**


View/Create Interactions

**Joan Arkins**

View/Create Interactions

**Ethel Kasinetz**

View/Create Interactions

**Stephen Kazman**

View/Create Interactions

Add Interactions in Sugar from Facebook

The screenshot displays the REACH Relationship Management interface. At the top, a Facebook header shows the user 'Steve Kaz' and a search bar. Below this, the REACH logo and 'Hillel: The Foundation for Jewish Campus Life' are visible. The main content area is divided into 'My Contacts' and 'My Events' tabs. A list of 'My Engagees' includes Eric Aarons, Dave Adam, Kathy Nikki Allen, Joan Arkins, Ethel Kasinetz, and Stephen Kazman. An 'Interaction Log' window is open, showing a form for adding a new interaction for Stephen Kazman. The form includes fields for 'Interaction Type' (set to 'Campus Group Activity'), 'Status' (set to 'Completed'), and 'Interaction Date' (set to 09/27/2011). A 'Subject' field is also present. Below the form, a list of previous interactions is shown, including '2011-09-22 - Facebook Wall Post' and '2011-09-22 - Met at a bar'. The window has 'Add' and 'Close' buttons.

facebook 18 Search Steve Kaz Home

Hillel: The Foundation for Jewish Campus Life
REACH
Relationship Management

My Contacts My Events

Kristi Amdur

My Engagees

- Eric Aarons
- Dave Adam
- Kathy Nikki Allen
- Joan Arkins
- Ethel Kasinetz
- Stephen Kazman

Interaction Log

Stephen Kazman

Interaction Type: Campus Group Activity

Status: Completed

Interaction Date: 09 / 27 / 2011

Subject: *

Type your interaction notes here.

☐ Make the note private

Add

2011-09-22 - Facebook Wall Post

2011-09-22 - Met at a bar
Interested in

Close

REACH Relationship Management
reach@hillel.org
Copyright © 2010 Hillel: The Foundation for Jewish Campus Life

REACH • Report/Contact this App • English (US)


Online M.Ed. Mathematics
educationdegreesource.com
Online Masters in Curriculum & Instruction

Match Event Attendees with Contacts in Sugar

facebook

18

Search



Hillel: The Foundation for Jewish Campus Life

REACH

Relationship Management

My Contacts

My Events

Logout of REACH

My Facebook Events (not in Reach)

31

Test123-ACTORE
Monday, October 31, 2011 at 5:00pm

Add

31

SEO Optimization
Thursday, August 4, 2011 at 2:30pm

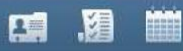

Add

My Reach Events Synched with Facebook

31

Test
Wednesday, August 31, 2011 at 4:00pm
Update Attendees

Contact Profile Page




Hillel: The Foundation for Jewish Campus Life
REACH
Relationship Management

Welcome, Lee Johnson | Log Out | Training Videos | Help

Home | **People** | Student Interactions | Events | Hillel | Universities | Reports | Expenses | Tag Categories

» Kathy Allen



STUDENT
Kathy Allen
kathy@test.net
Gender:
Birthdate:
Jewish: Yes
Birthright Eligible:
Class Of: 2011
Major:
Dorm:
Student ID:
FERPA Hold: No
Other ID:
Primary Team: Hillel at South Harmon Institute of Technology
Address:
Notes:
Date Created: 09/27/2011 09:34am by Lee Johnson

South Harmon Institute of Technology
123 Main Street
Anytown, OH 43211 USA

Hillels
Engagers (1)
Remove Me ++ Add Others Refresh
Lee Johnson
No Interactions

Interests
Edit Refresh
No Data

Immersive Experiences
Refresh
No Data

Recent Activities
Interactions
+ Add Refresh
No Data
Next Steps
+ Add Refresh
No Data
Events
+ Add Refresh
No Data

facebook
Profile
Wall Post
My Facebook Engagees
Stephen Kazman
Rory Thayers
Ethel Kasinetz
Andrea Hoffman
Dave Adam
Joan Arkins
Eric Aarons

Write Comments to Facebook Wall from Sugar

The screenshot displays the SugarCRM interface for 'Hillel: The Foundation for Jewish Campus Life'. The top navigation bar includes 'Home', 'People', 'Student Interactions', 'Events', 'Hillel', 'Universities', 'Reports', 'Expenses', and 'Tag Categories'. The 'People' tab is active, showing a list of students. The profile of 'Kathy Allen' (kathy@test.net) is selected. A 'Wall Post' modal is open, allowing a message to be posted to her Facebook wall. The modal contains a text area for the message and a warning: 'This message will appear on the Person's Facebook Wall. It is public and not private'. The background shows the student's profile details, including gender, birthdate, Jewish status, birthright eligibility, class of, major, dorm, student ID, FERPA hold status, other ID, and primary team. The bottom of the screen shows the 'South Harmon Institute of Technology' profile and a list of 'Hillels'.

Hillel: The Foundation for Jewish Campus Life
REACH
Relationship Management

Welcome, Lee Johnson

Home People Student Interactions Events Hillel Universities Reports Expenses Tag Categories

» Kathy Allen

STUDENT

Kathy Allen
kathy@test.net

Gender:
Birthdate:

Jewish: Yes
Birthright Eligible:

Class Of: 2011
Major:
Dorm:
Student ID:
FERPA Hold: No

Other ID:
Primary Team: Hillel at South Harmon Institute of Technology

South Harmon Institute of Technology
123 Main Street
Anytown, OH 43211 USA

Hillels

Wall Post


Message:

This message will appear on the Person's Facebook Wall. It is public and not private

Cancel Save


4am by Lee

Link Existing Contacts to Facebook Friends


**Hillel: The Foundation for Jewish Campus Life**

REACH
Relationship Management

Home **People** Student Interactions Events Hillel Old Sugar Reports Universities ▾


 » handy manny ☆


No Photo Available


 **Link To Facebook**



facebook

My Facebook Engagees

 Пашка Семенкин

 Eric Seringo

 Ethel Kasinetz

  **Actions**

STUDENT **BOARD MEMBER**

handy manny


Gender:
Birthdate:

Jewish: Yes
Birthright Eligible:



Class Of: 2014
Major:
Dorm:
Student ID:
FERPA Hold: No



Other ID:
Primary Team: Hillel at South Harmon Institute of Technology

Address:
Notes:
Date:

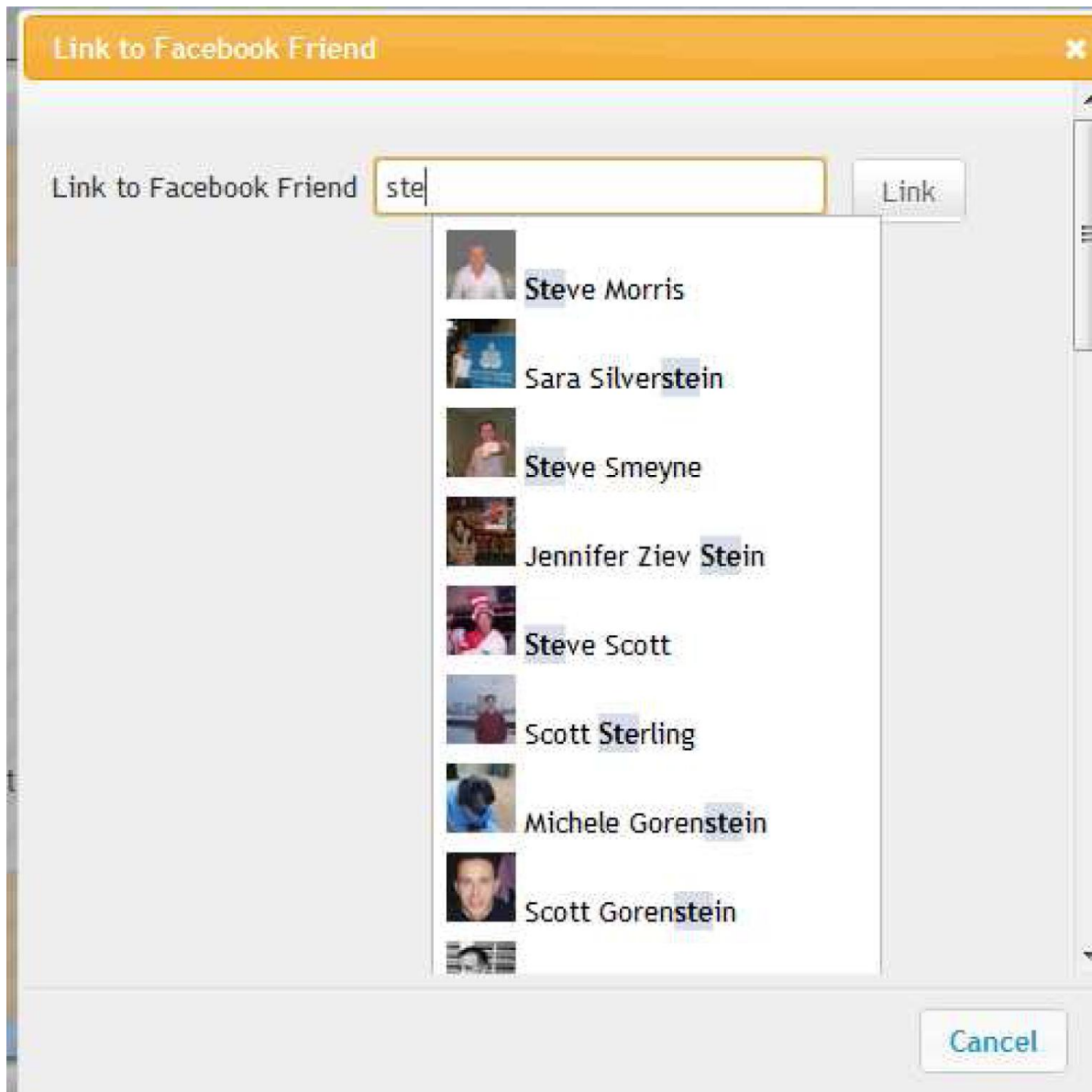
 **South Harmon Institute of Technology**
Antigua

Hillels

Engagers (1)
 Remove Me ++ Add Others  Refresh



Interests
 Edit  Refresh


Type the names of Facebook friends





Facebook Friend Request

[Home](#) **[People](#)** [Student Interactions](#) [Events](#) [Hillel](#) [Universities](#) [R](#)

 » **Rory Thayers** 



   **Actions**

STUDENT **INTERN**

Rory Thayers

charris@hillel.org

Gender: Female

Birthdate:

Title:

Other ID:

Primary Team: Hillel at South Harmon Institute of Technology

facebook

 Add as Friend

 Profile

[My Facebook Engagees](#)

Mobile Interactions

The screenshot shows a mobile application interface for REACH (Relationship Management). At the top, there is a header with the text "Hillel: The Foundation for Jewish Campus Life" and the REACH logo. Below the header, there is a section titled "Select a module" with a dropdown menu set to "Student Interactions" and a "Go" button. The main section is titled "Student Interactions:" and contains a form with the following fields:

- Subject: * Coffee with Rory
- Interaction Type: * Coffee date
- Assigned to: Lee Johnson
- Status: * Completed
- Interaction Date: * 09 / 16 / 2011
- Interaction Notes: Had coffee with Rory and learned she'd like to go on an Alt Break trip.

At the bottom of the form, there are "Save" and "Cancel" buttons. Below the form, there is a navigation bar with links: [Home](#), [Back](#), [Create Person](#), and [Log Out](#).

Open Social Business Platform



Social Business and Social CRM

- Start with the customer
- Choose an Open CRM System
- Enable a flexible, Cloud 2.0 infrastructure
- Integrate Collaboration and conferencing
- Allow Users to use their social tools of choice

The Sweeter Road

Microsoft
Oracle
SFDC



A world map with a dark blue background and light blue landmasses, showing the outlines of continents and major islands.

Thank you

Tom Schuster
tschuster@sugarcrm.com



Agenda

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11:45 - 12:15	Pause	
12:15 - 12:45	Kunden berichten über ihre Erfahrungen	Raik Brauns, Online Sales & Marketing Manager Global, 3Dconnexion GmbH
12:45 - 13:20	Live Demo: A Day in the Life of a Social Business	Mirco Müller, Geschäftsführer, Insignio CRM GmbH & Andrey Andreev, Technical Manager EMEA, SugarCRM
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