



#IBMSocialBiz #sugarcrm

Get Social

The Social Business Roadshow

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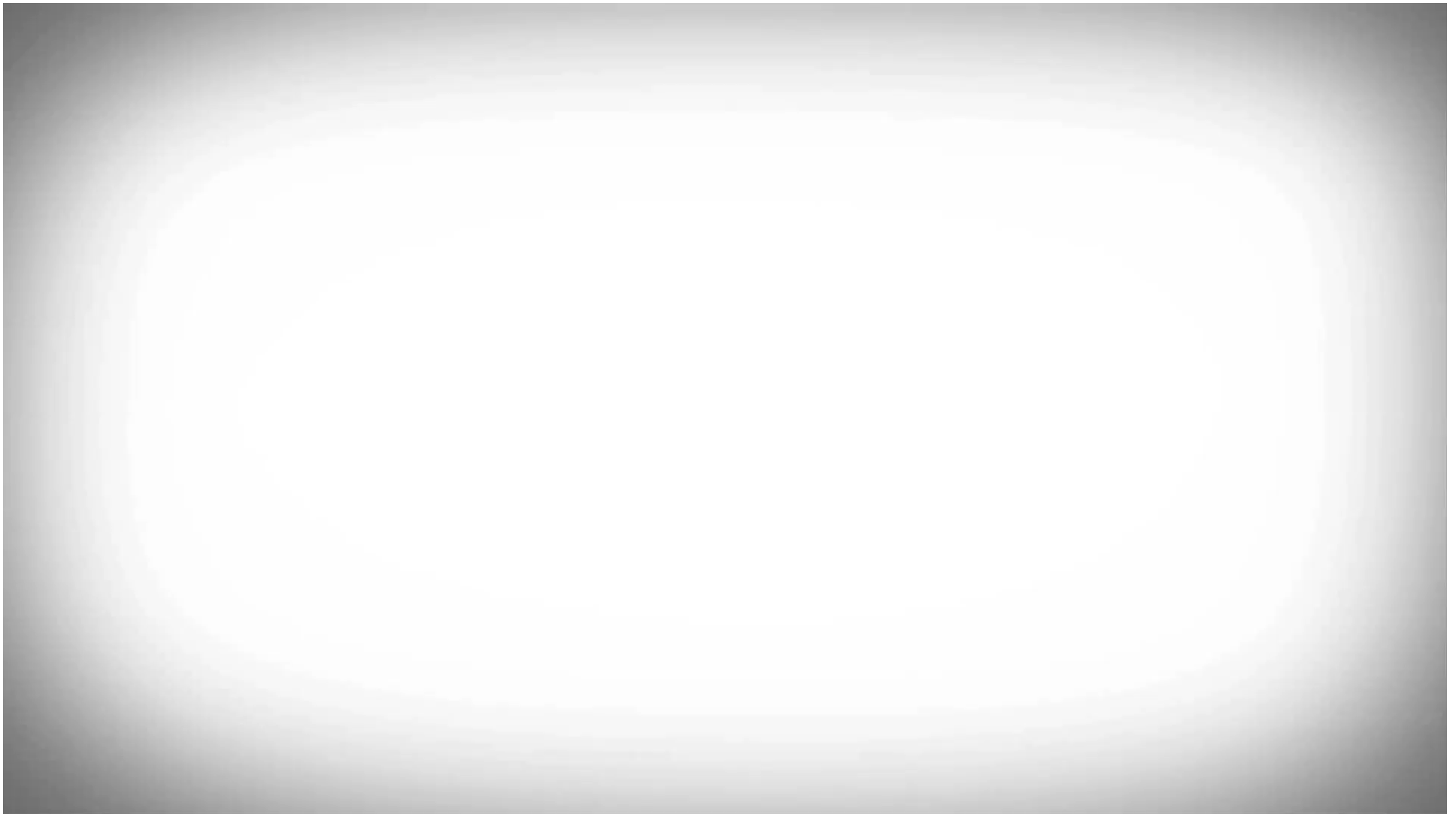
Hosted By:

levementum

Welcome and Intro Video

Chuck Coulson
VP, Business Development
SugarCRM





Introductions

Chuck Coulson
VP, Business Development
SugarCRM



Our Speakers Today

- Brian Vellmure



@BrianVellmure

- Geoff Mobisson



@g

- Nick Halsey



@n

- Eric Ostly



@ll

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- Cheri Stockton



@c



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Agenda



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- Keynote: Brian Vellmure

- Customer Testimonial

----- Coffee break -----

- The New Rules and Best Practices of Social CRM (*Sugar*)

- From Social Media to Social CRM: Best Practices for Becoming a Social Business (*IBM*)

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- A Day in the Life of the Social Business

- Question and Answer Session





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Keynote

Brian Vellmure

Principle and Founder

Initium LLC / Innovantage



Customer Relationship Innovation *for the* Emergent Social Business



Brian Vellmure
Initium LLC / Innovantage

<http://www.brianvellmure.com>

<http://www.twitter.com/BrianVellmure>

Surveying a Changing Landscape

Cloud Computing

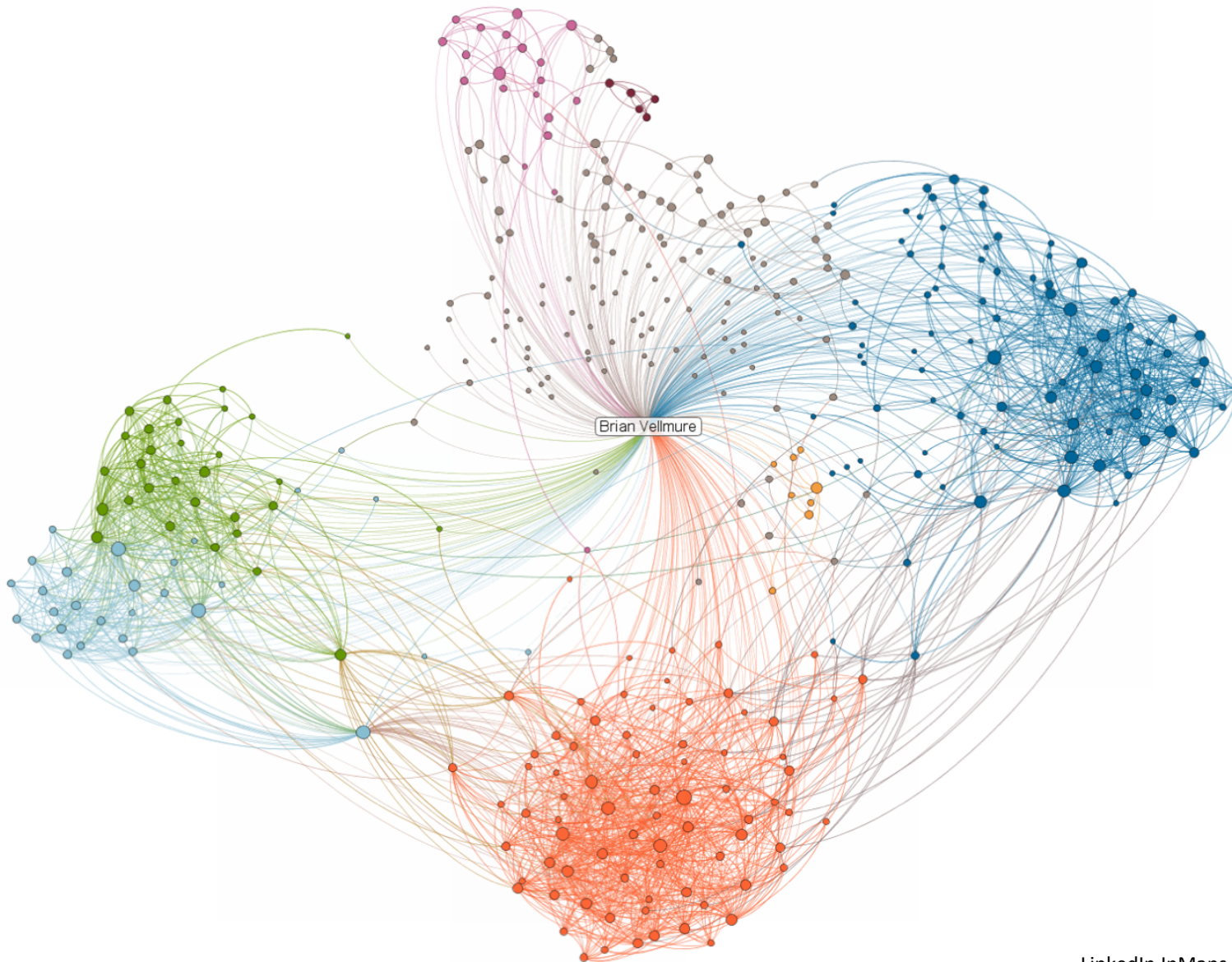


Brian Vellmure

<http://www.brianvellmure.com>

@BrianVellmure

The Expansion of the Social Web



LinkedIn InMaps

Brian Vellmure

<http://www.brianvellmure.com>

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Increased Connectedness



Brian Vellmure

<http://www.brianvellmure.com>

@BrianVellmure

The Digitization of Everything



Portrait by
Popeye Francom

The Economist

FEBRUARY 27TH - MARCH 5TH 2010

Economist.com

Obama the warrior

Misgoverning Argentina

The economic shift from West to East

Genetically modified crops blossom

The right to eat cats and dogs

The data deluge

AND HOW TO HANDLE IT: A 14-PAGE SPECIAL REPORT



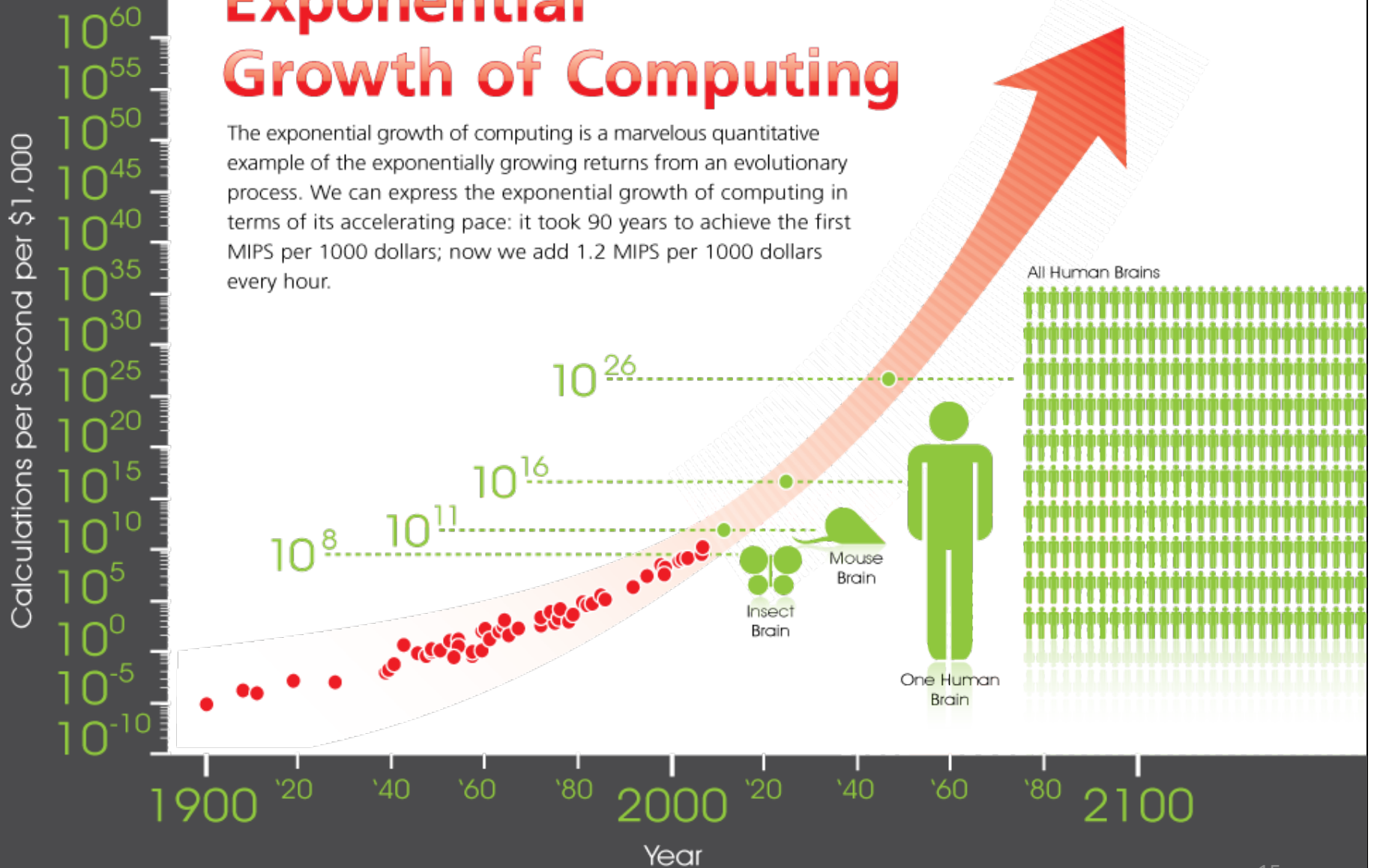
Brian Vellmure

<http://www.brianvellmure.com>

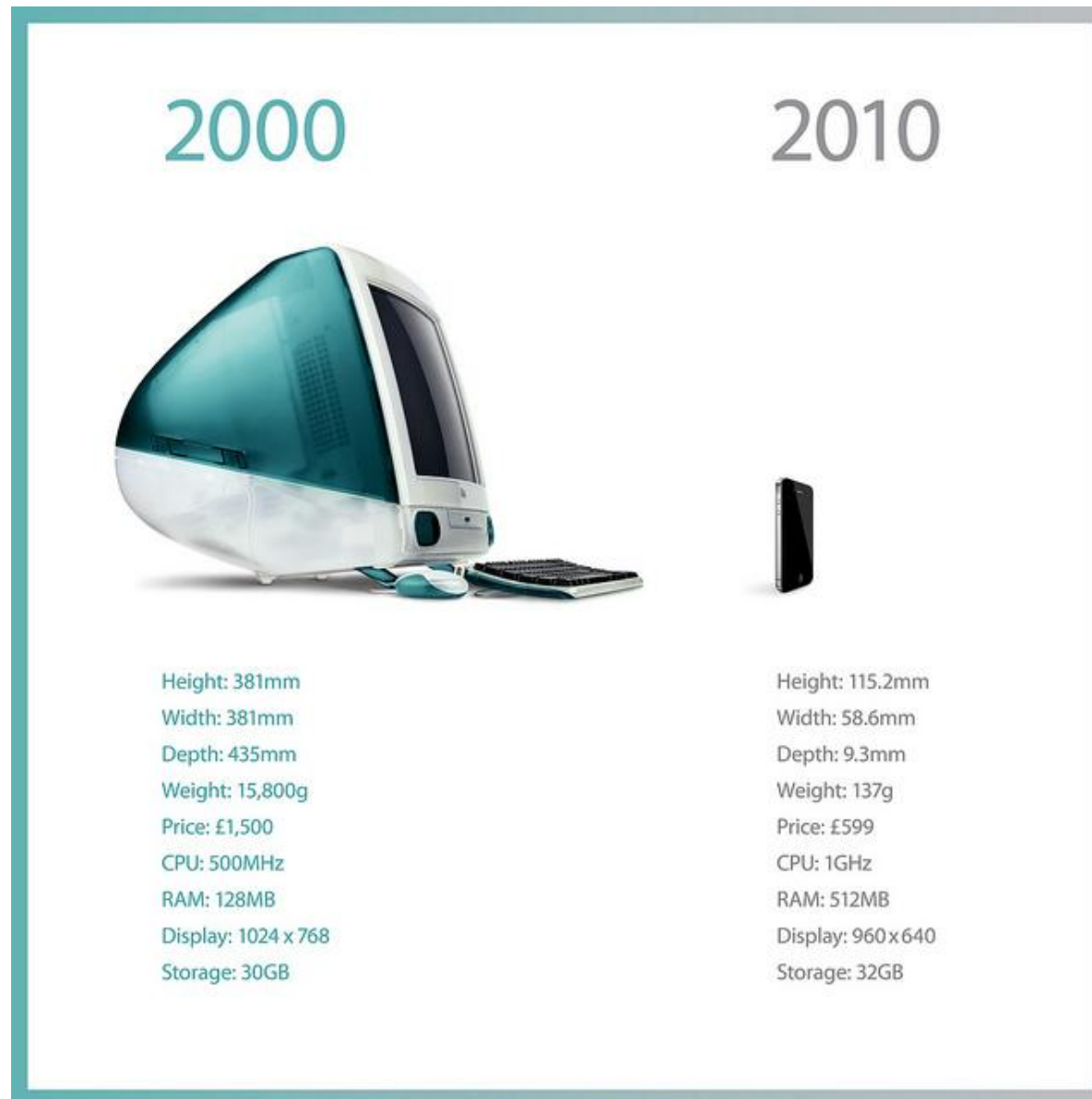
@BrianVellmure

Exponential Growth of Computing

The exponential growth of computing is a marvelous quantitative example of the exponentially growing returns from an evolutionary process. We can express the exponential growth of computing in terms of its accelerating pace: it took 90 years to achieve the first MIPS per 1000 dollars; now we add 1.2 MIPS per 1000 dollars every hour.



Price/Performance Doubling every 18 months



Source: Ray Kurzweil



Memes and information spread with unprecedented Reach & Speed

Who is the Social Customer?

(insert a picture of the crowd into this slide)

Connected. Savvy. Demanding.



**with access to lots and lots of information about...
your company, products, services, people, partners**

A close-up, high-angle shot of a man's face, looking upwards and to the left. The lighting is dramatic, with strong highlights on his forehead, nose, and cheekbones, and deep shadows on the sides of his face. He has a slight smile, showing his teeth. The background is a solid, dark green.

**The one with the
most information**

WINS

Not just affecting business



Brian Vellmure

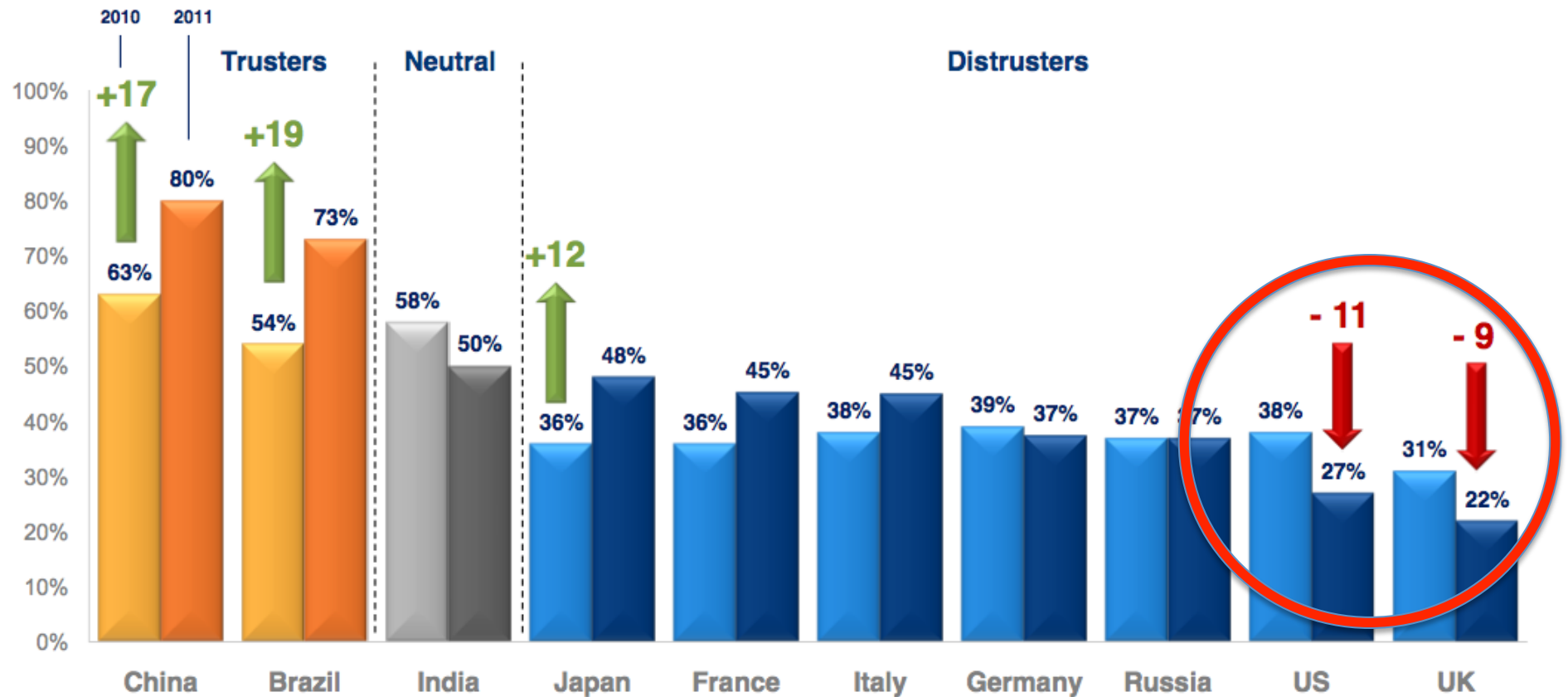
<http://www.brianvellmure.com>

@BrianVellmure

TRUST

Developed markets more distrustful of media

How much do you trust media to do what is right?

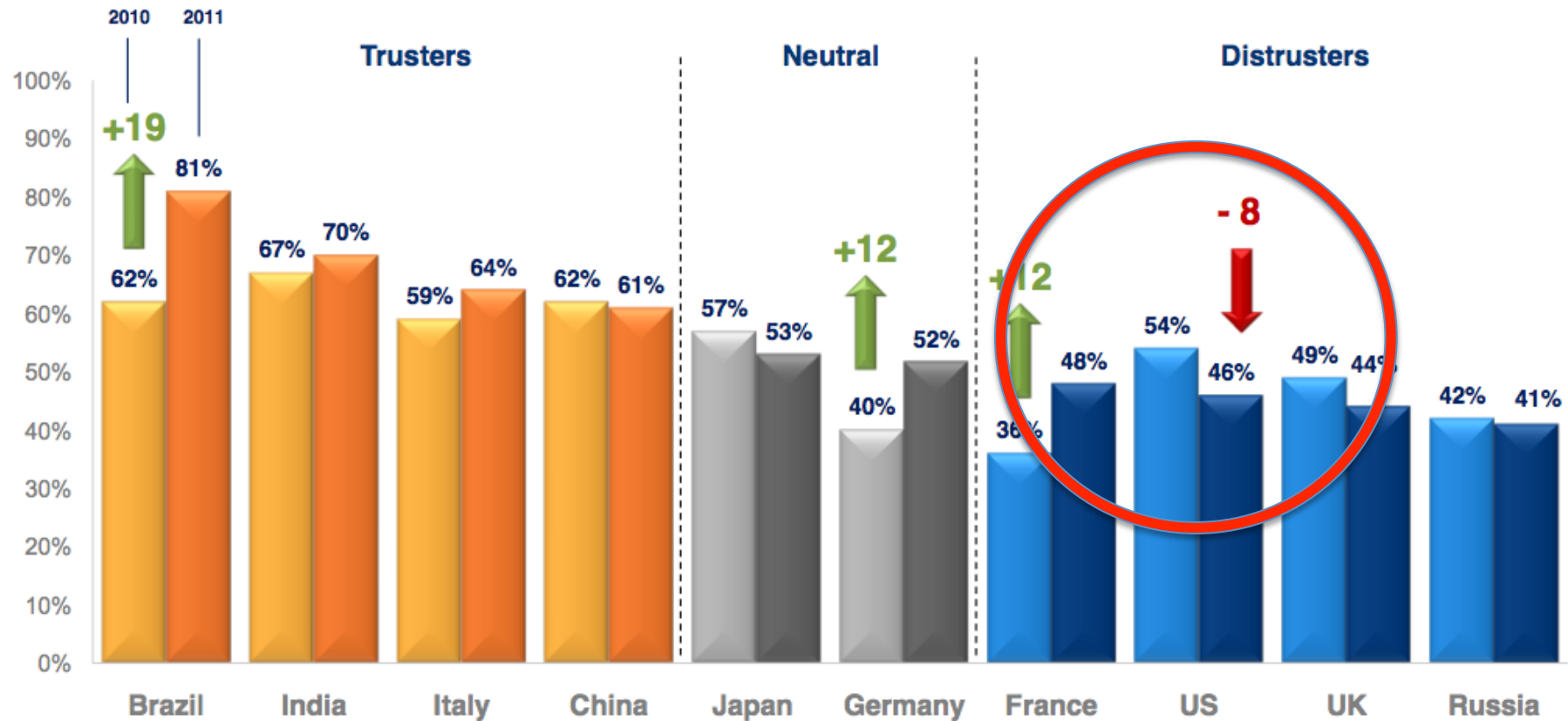


Responses 6-9 on 1-9 scale; 9=highest; Informed publics ages 25 to 64; Top 10 GDP countries

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Emerging markets dominate as “business trusters” U.S. drops to within 5 points of Russia

How much do you trust business to do what is right?



Responses 6-9 on 1-9 scale; 9=highest; Informed publics ages 25 to 64; Top 10 GDP countries

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What matters for corporate reputation: Quality, transparency, trust, employee welfare most important

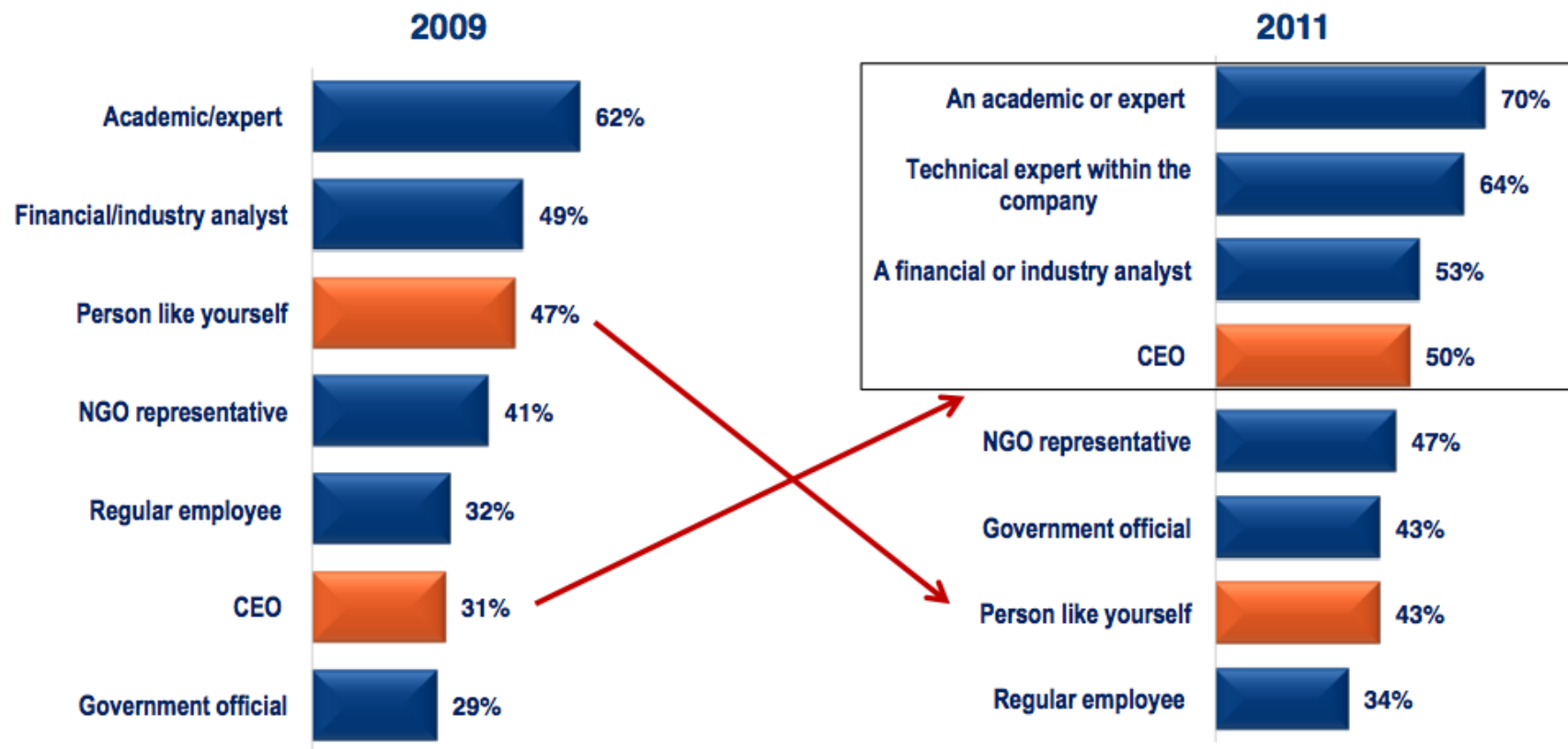
How important are these factors to corporate reputation?



Responses 8-9 on 1-9 scale; 9=highest; Informed publics ages 25 to 64

CEOs lead rise in trust in authority, but “person like me” drops amid flight to credentialed spokespeople

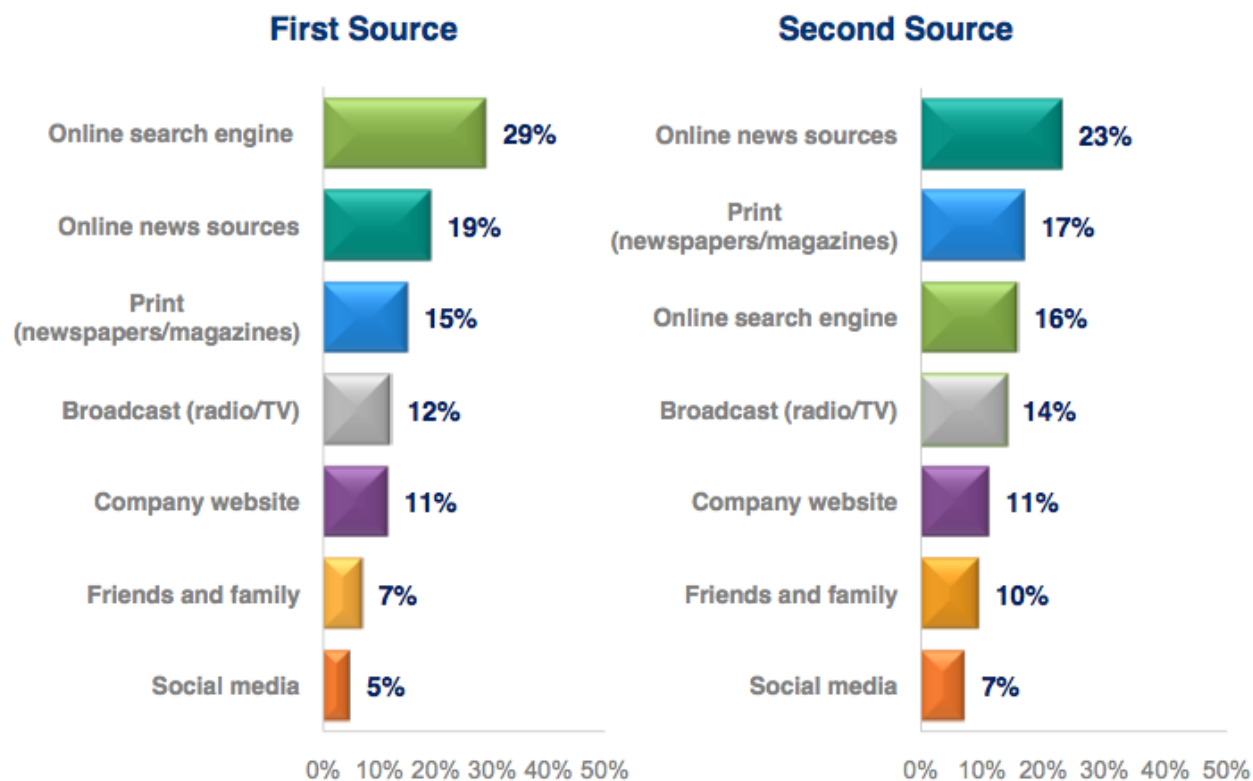
If you heard information about a company from one of these people, how credible would that information be?



Responses “Extremely credible” and “very credible”; Informed publics ages 25 to 64

Search engines “go-to” source; online news second

Where do you generally go first for news about a company? Then where do you go?



Informed publics ages 25 to 64

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A background image showing silhouettes of business professionals in a modern office setting with large windows. The scene is backlit by bright sunlight, creating a high-contrast, professional atmosphere. Several people are standing and talking, while others are sitting on a ledge, all appearing to be in a collaborative work environment.

**93% of B2B buyers use
search to begin the buying
process**

Source: Marketo

**90% of B2B Buyers
say when they're
ready to buy...**

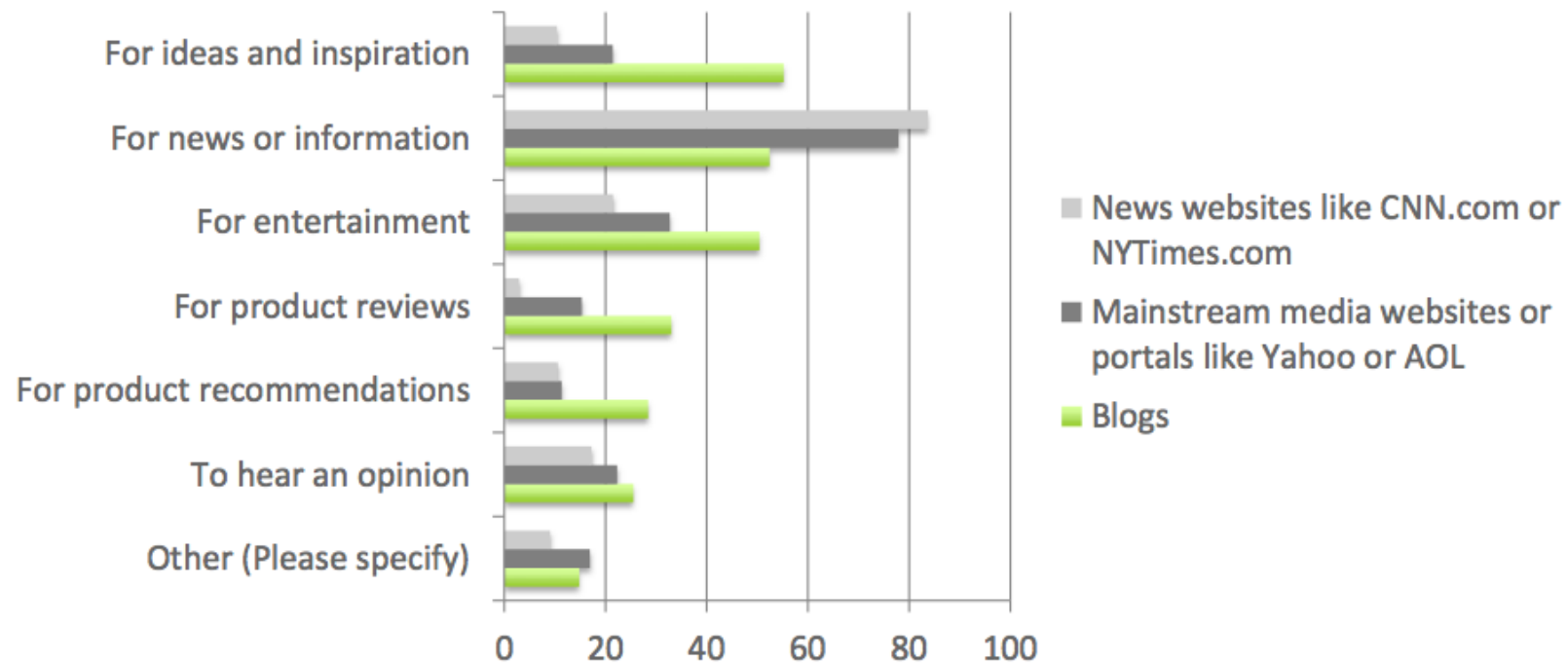
THEY'LL FIND YOU

Source: DemandGen Report

What do consumers say about blogs?

- + Outpace other media for inspiration, product information, and opinion
- + Generate more trust, recommendations and purchases.

Why do you visit the following media?



**70% of a typical buying process is completed
before a sales person gets involved**



Source: Sirius Decisions

Photo courtesy of freefoto.com

Today's B2B Buyer Profile

- ✓ 78% started with informal info gathering
- ✓ 59% engaged with peers who addressed the challenge
- ✓ 48% followed industry conversations on topic
- ✓ 44% conducted anonymous research of a select group of vendors
- ✓ 41% followed discussions to learn more about topic
- ✓ 37% posted questions on social networking sites looking for suggestions/feedback
- ✓ More than 20% connected directly with potential solution providers via social networking channels

Source: DemandGen
Breaking Out of the Funnel: A look inside the mind of the New Generation B2B Buyer



Social Customers Talk

The typical American mentions specific brand names 60 times per week in online and offline conversations.

Source: WOMMA



Brian Vellmure

<http://www.brianvellmure.com>

**Customers are
aggressively
searching for help**



With their wallet

**... and they'll
pay a premium for it**



And their Mouth

More than

85%

**of consumers
said they would**

PAY A PREMIUM of up to

25% for a

**Superior Customer
Experience.**

Source: RightNow Technologies Customer Experience Impact Report



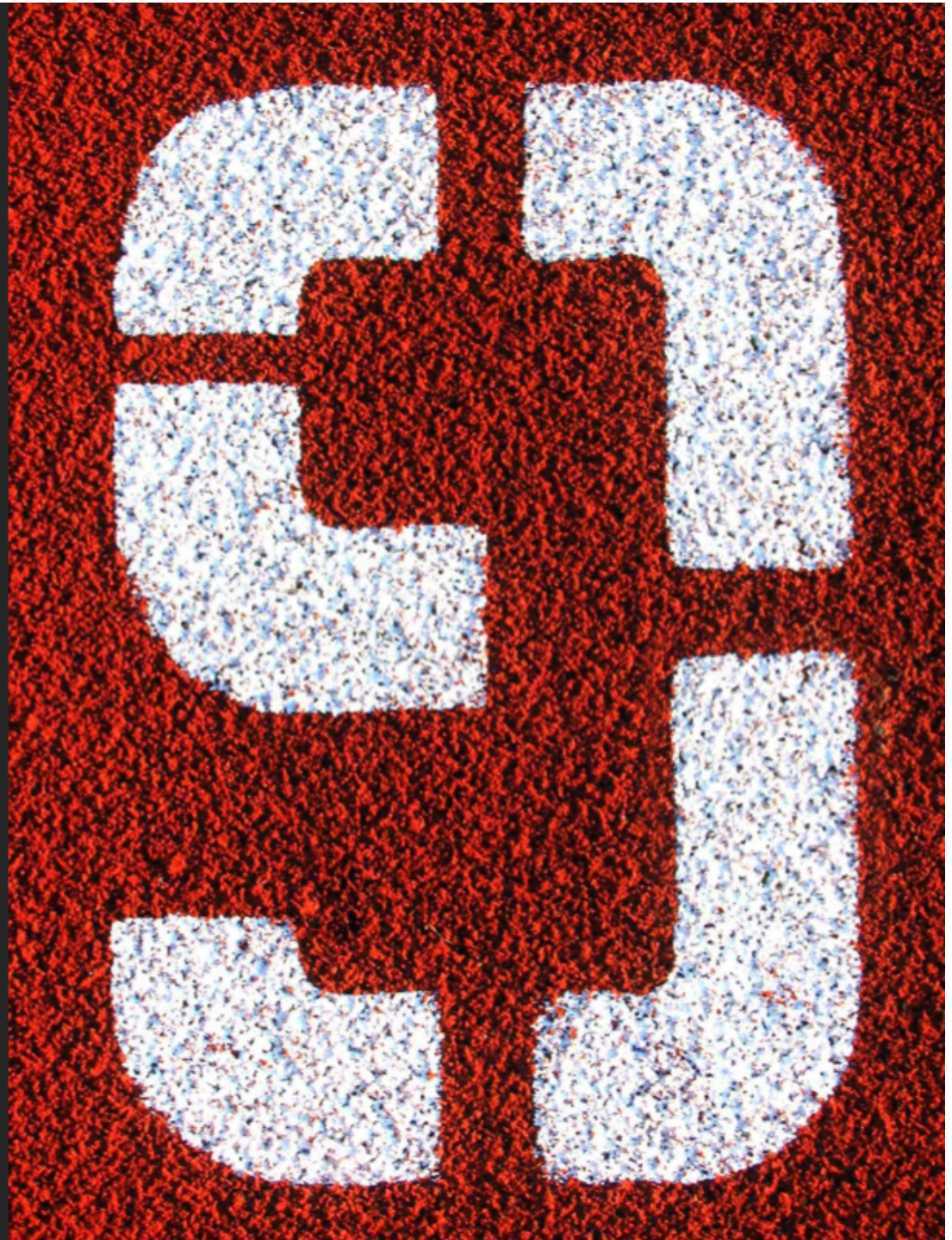
Americans will spend

9% more

with companies that
provide excellent service

but 2/3 feel companies
aren't doing enough
to **EARN** their business

Source: 2010 American Express
Global Customer Service Barometer



Ladies and Gentlemen...

The Social Customer Profile

- Generally **distrustful** of **media** and **businesses**
- Do things on **their terms**, discontent with what corporate Status quo is offering them
- They'll find **who** and **what** they need, **when** they need it, from **where** they are
- **Connected** and **Vocal**; leveraging, learning from and helping their immediate and extended peer group
- They extend the most **trust** to respected **experts**
- Ready to **hyper reward** and promote those that **stand out**
- Ready to **abandon** and **destroy** those that **disappoint**



Implications for your Customer Relationship Strategy

Knowing your Customer **is a Must**



“Most, if not all, senior executives assert they want to **understand their customers better. Indeed, in our last CEO study, 88 percent of business leaders — and an **astounding 95 percent** of those heading the most successful organizations — said **getting closer to their customers was the top priority** for realizing their strategy over the next five years.**

Increased Mandate to Listen, Learn, Respond

Brian Vellmure

<http://www.brianvellmure.com>

@BrianVellmure

Quora Search Questions, Topics and People

Product Comparisons Customer Relationship Management (CRM) SugarCRM Salesforce.com Edit

Why do companies pick SugarCRM over SFDC? Edit

My sense is that it's less about competition and price, and more about on-premise and open source functionality. Edit

Add Comment • Wiki • Flag Question

3 Answers • Create Answer Wiki

Brian Briggs
1 vote by Syed Mohammed Agha

For a fair comparison, I think you have to compare the priced version of Sugar to SFDC. The free version is fairly limited as you might guess.

Sugar is looking to take on SFDC the way SFDC took on Siebel 8 years ago by changing the focus or paradigm of CRM. People pick SugarCRM over SFDC principally because it's open, flexible and intuitive. Being on a shared multi-tenant SaaS platform limits SFDC's ability to evolve the base platform because any change affects everyone. And it affects everyone immediately.

The new Sugar 6 release has a web 2.0 look and feel and is very easy to understand. It's also very proficient allowing the sales rep to do most activities in one click.

Flexible means that you can readily adapt it to your business process. Yes you can do some of that with SFDC but because you have to do it in their proprietary Apex language, you need a \$200/hr Apex programmer vs. a \$50 PHP programmer. And then you have to pay extra fees for those changes.

Open means you have access to the relational database storing your data. This means you can run sophisticated queries against that DB that you can't do using the standard access of SFDC. With SFDC you can only get a CSV dump which is fine for tweaking data in Excel and re-importing.

Lastly, if you compare Apples to Apples, Sugar is \$30/seat/month while SFDC is \$125/seat/month since you don't get workflow automation, territory management and a few other things without going to the Enterprise version.

However, SFDC is one of the best marketing organizations I've ever seen. This is where Sugar comes up a little short.

Add Comment • Thank • Aug 20, 2010

LinkedIn Account Type: Basic

Home Profile Contacts Groups Jobs Inbox 236 Companies News More

Answers Search...

Answers Home Advanced Answers Search My Q&A Ask a Question Answer Questions

Go back to Answers Search Results | « Previous | Next »

Diana Rohini LaVigne 1st
Executive Director at Bay Area Bicycle Coalition
see all my questions

Are you in the B2B space and use a CRM software? Which one? Do you love it or hate it and why? So many softwares are out there and so little time!!!! Thank you in advance!

www.salesforce.com and **sugarCRM** are the top ones being suggested at the current time. This is for a multinational outsourcing company called Nair & Co based in Sunnyvale, CA. It handles highly sensitive data like payrolls for clients so the solution must be very secure. I'd love some feedback.

posted February 27, 2008 in Customer Relationship Management | Closed | Report question as...

Share This »

Answers (18)

Patrick Allmond 2nd
Online Marketing Mojo Teacher
see all my answers

We use **SugarCRM** because the open source version is free. As a small business that is a huge factor for us right now. I'll probably convert to salesforce once we have 100 people, but until then I need a quality low cost product. The best balance is **SugarCRM**.

posted February 27, 2008 | Report answer as...

Mike Morgan 2nd
Co-Founder @ COMPLETE xRM
see all my answers

Great Question ! There are numerous hosted products that provide you with a variety of features which may provide a full solution or a partial solution. I have heard there are more than 180 CRM solutions on the market today—which I have never validated.

What I found in looking for the right solution for my needs (which is similar to most small to medium size businesses) was that very few of them had a process engine to automate the dynamic transactions that take place within a business. What it sounds like you are looking for is an application that can manage your complex B2B transaction process. A CRM technology which integrates Business Process Management (BPM) through a transactional engine should be a serious consideration when looking for a solution. It will allow you to map out and customize the B2B transaction to your definition and allow you collaborate with decision makers in the process—customers, partners, affiliates, etc. More importantly you build the process and the application does the work and keeps you on track.

With that said, you should look @ PlanPlusOnline . It was developed using FranklinCovey's planning methodology as well as combining the CRM with proven methodology. FranklinCovey is a worldwide leader in organization effectiveness. It's technology with FranklinCovey's proven productivity methodology that users are able to quickly adopt and use to prioritize their tasks, mission statement, values, goals, top priorities, and daily activities. You combine that with typical CRM modules such as Sales, Support, Marketing, and Projects, and you end up with a solid online application that is customizable for any business process, including yours.

With all that said, it provides CRM functionality with Business Process Management (BPM). It's technology with FranklinCovey's proven methodology that users are able to quickly adopt and use to prioritize their daily activities. - The following link will allow you to create a VIP account for a test drive without having to enter a creditcard.

<http://www.planplusonline02.com/newpoolreq1.isp?xrm30=Y&src=PROI>

Jeremy Roberts, Business and Personal Productivity Nerd

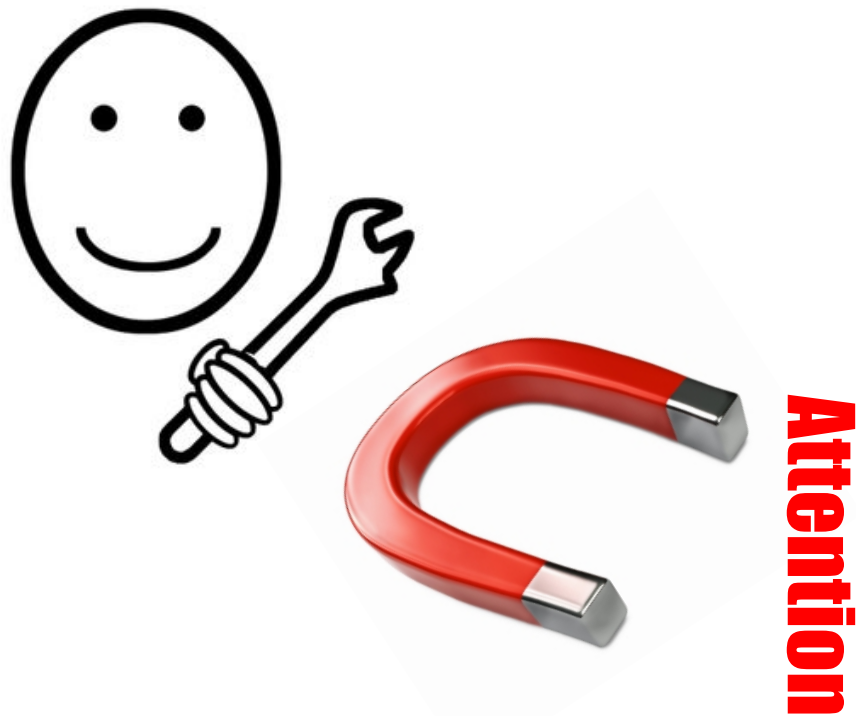
Having used both SugarCRM and Salesforce, I can't recommend SugarCRM enough! The huge differentiators are:

- Easily understood, intuitive user experience
- Flexible framework and easily configured with customisations
- It's Open Source - you can customize just about **anything** on the platform!
- There are **no limits** on the amount of API calls you can do
- You can host it anywhere you want
- You can easily export your data
- You can easily tailor each user's home page (way too difficult in SFDC)



Customers
need you to
understand
what **they** are
trying to **achieve**

Useful = Attention Magnet

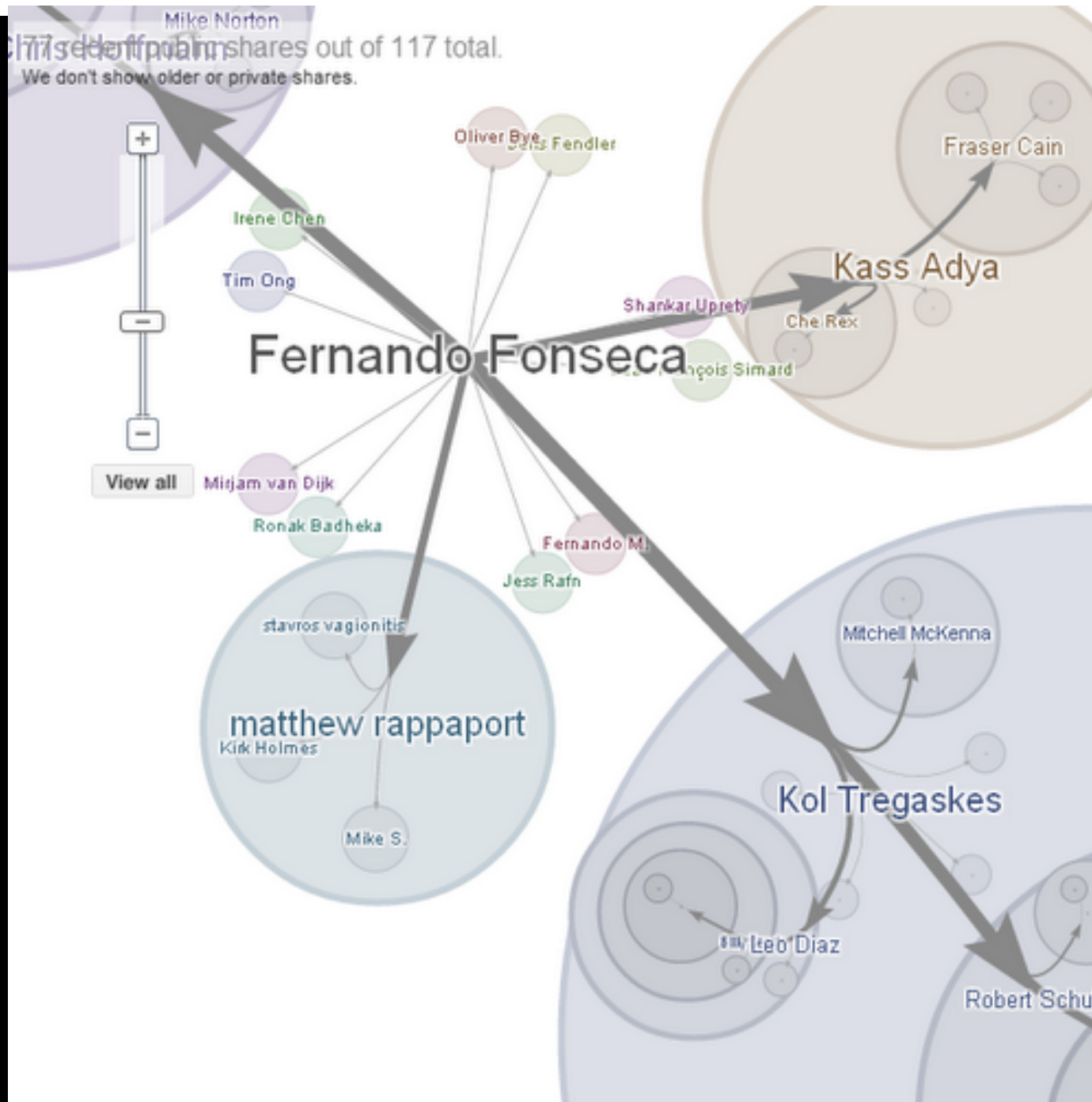


**Customer
Interaction
has evolved...**

**FROM
“One to Many”**

**TO
“One to One”**

**TO
“One to One to Many”
&
“One to Many to One”**



Customer Profiles will also evolve



CLV (Customer Lifetime Value)

+ CRV (Customer Referral Value)

+ CIV (Customer Influence Value)

+ CKV (Customer Knowledge Value)

Customer Engagement Value

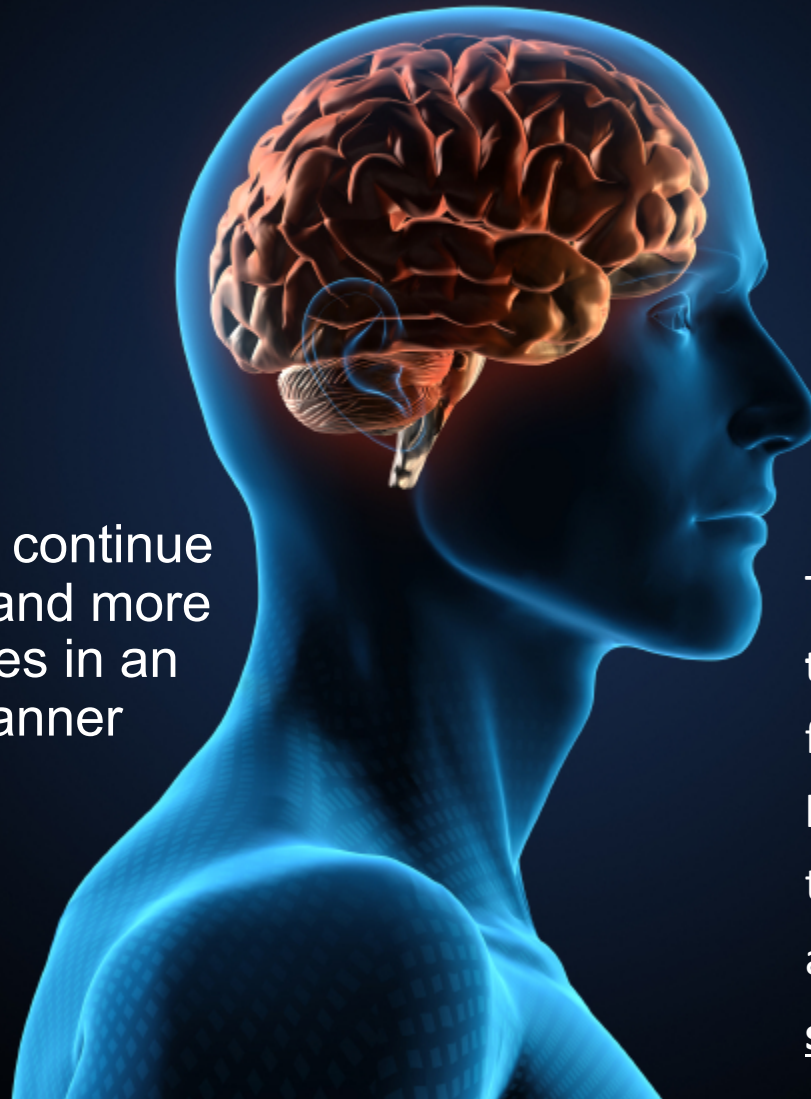
Undervalued or Overvalued Customers: Capturing Total Customer Engagement Value

V. Kumar, LerzanAksoy, Bas Donkers, RajkumarVenkatesan, Thorsten Wiesel and Sebastian Tillmanns

A Marketing Mindset for the Social Era

- Understand the ***Buyer's Journey***
- Blow them away – create something ***Remarkable***
 - For every stage
 - For the most relevant channel
- Gain ***Permission*** – earn ***Trust***
- Be ***Genuine*** and ***Transparent***
- Be ***Unique***
- Make it ***Shareable***
- Invite them to continue the journey with you & ***Tell a Friend – Tell the World***

Increased Connection Increased Expectations Increased Opportunities



Our customers will continue to reveal more and more about themselves in an unstructured manner

This presents a **tremendous opportunity** for organizations who have the **ability** and **desire** to *listen, understand,* and *respond* with something that resonates

Key Takeaways and Action Items



Be Found

Stand out and be Hyper-Rewarded

Brian Vellmure

<http://www.brianvellmure.com>

@BrianVellmure



Listen to and Leverage Market Conversations

The background of the slide is a dark field filled with numerous out-of-focus, colorful circles of light in shades of red, orange, yellow, green, and blue, creating a bokeh effect.

**Use advanced analytics and
richer customer profiles
for competitive advantage**



**Let's continue the
conversation!**



Brian Vellmure
Initium LLC / Innovantage

<http://www.brianvellmure.com>

<http://www.twitter.com/BrianVellmure>

Agenda



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- Keynote: Brian Vellmure

- Customer Testimonial

----- Coffee break -----

- The New Rules and Best Practices of Social CRM (*Sugar*)

- From Social Media to Social CRM: Best Practices for Becoming a Social Business (*IBM*)

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- A Day in the Life of the Social Business

- Question and Answer Session



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Customer Case Study

Geoff Mobisson
Managing Director
Levementum

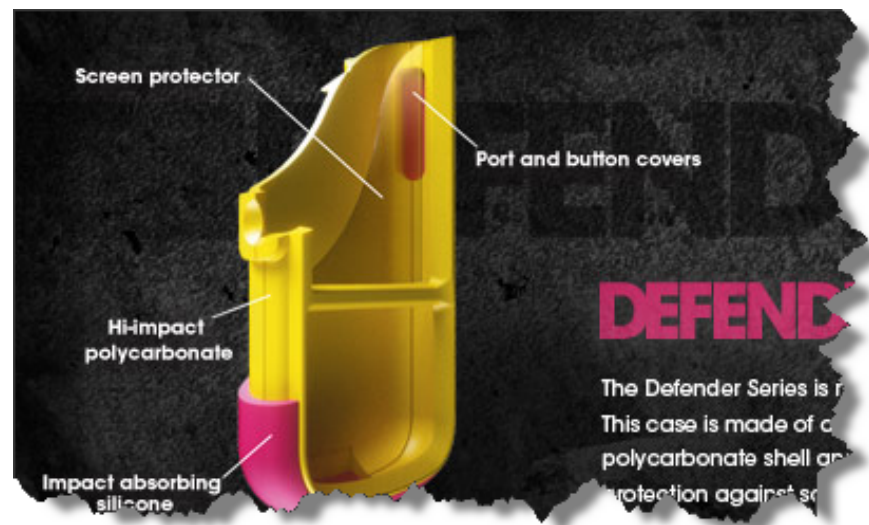


Otterbox's Social March

...an unorthodox company, with an
“orthodox” CRM implementation...and
how it’s “*fixing that problem*”

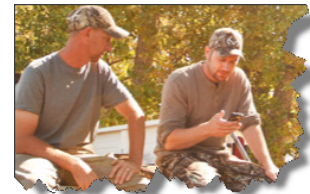
Agenda

- “...what are YOU going to takeaway from this presentation...”
- Who or what...is Otterbox?
- The SugarCRM journey
- Results
- The CRM “look in the mirror...”
- Positioning for Social!
- Otterbox Nation!
- SocialCRM strategy
- Takeaways...

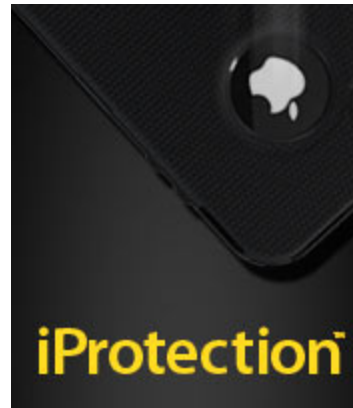


“...begin with the end in mind...”

- This presentation assumes one of two things:
 - You are contemplating a CRM investment, and would like to position your future implementation to take advantage of SocialCRM concepts”
 - You have an entrenched CRM solution, and need to understand how to think about leveraging the value of Social
- This presentation concludes with two points
 - Today, the hard part of social CRM is “deciding to do something”.
 - Today, once you’ve committed to leveraging Social assets, the integration and tools are at your fingertips...it’s “the easy part”



Who the heck is Otterbox?



- Known as an innovator of protective solutions for the leading global handheld manufacturers, wireless carriers and distributors.
- Starting with something as simple as a box, OtterBox was created in 1998
 - built upon fundamentals of hard work, ***creativity*** and perseverance.
 - Our cases are dedicated to all the ***klutzy, spontaneous, chaotic, graceless individuals*** who have broken a device or valuable due to their ***active lifestyle***

The boring stuff...

- Based in Fort Collins, CO
 - 2008 revenues...less than 10m
 - 2008 employees...less than 50
 - 2010 revenues...greater than 200m
 - 2010 employees...greater than 300
-
- Culture aside, they are a traditional manufacturing outfit
 - Offshore manufacturing
 - Sell through distribution and retailers
 - Provide direct support to customers



Their CRM journey

- Otterbox's CRM journey – started in a traditional manner.
 - A focus on Customer Service and Call Center operations
 - A desire to enable “total customer satisfaction”
 - A need to improve the “direct contact that customers have with Otterbox”
 - An additional objective, of enabling the Sales process with Distribution and Retail...but this was a secondary goal.

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Otterbox' Powerful Promise

- ...their boxes don't break...but when they do...
- Otterbox will replace the box
 - Without a receipt
 - Without proof you have it
 - Without proof its broken
 - Without even knowing if you have ever owned one...
- ...yes, its an expensive promise.

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Otterbox' CRM Critical Use Cases

- A call or email comes in...its not a happy customer...
 - Is my box broken?
 - How do I get a new box?
 - Where is the new box you promised me?
 - Where are all my customers new boxes??
 - Why did you send me a different box?
 - How do I open the Otterbox???? It's a steel trap!

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Otterbox's CRM implementation

- At the point of the call...
 - Integrate Telephony with CRM
 - Enable telephony driven CRM screen pops (a customer with a problem...that has called before...will be a happier camper if you already know their pain)
- At the point of the incident
 - Simplified entry of the incident
 - Suggestive knowledge base suggestions on the call
 - Extensive Knowledge Base and Case utilization
 - Expansion of the Cases module in CRM to include “call scripts”

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Otterbox's CRM implementation

- Be an informed member of OtterNation...
 - Integration of CompiereERP with the CRM platform
 - Enable creation of the RMA in real time
 - Show RMS status
 - Track the new order (replacement)
 - Check inventory and product status
 - Manage the shipment
 - ...in summary, an ambitious CRM and ERP integration plan that involved
 - Compiere ERP
 - TIBCO enterprise integration technology

Otterbox's CRM implementation

- A CRM implementation that's both B2B and B2C
 - Most of the calls are consumers
 - Some of the calls are distributors or retailers
 - ...and they are pretty darn important
 - CRM implementation needed to allow for easy support of the "Contact" and the "Account" in an integrated fashion

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SUGARCRM.



Why SugarCRM?

- Flexibility
 - Traditional CRM...but it needed to contort and flex...
- Integration
 - Otterbox needed a platform that had no artificial or unnecessary obstacles to sharing or accepting information in other systems
- Cost
 - Many platforms fit the bill early, but “Scale” at Otterbox was not a pipe-dream. It was reality
 - What does TCO look like with 10X the personnel....
- Partners
 - Amazing depth in “Expert Community”
 - Strong new partners in “faraway spaces”
- Control and Vision
 - Otterbox valued “control of its own destiny”
 - Otterbox...knew it had to do something “Social” (...but what?)

Results and New Needs

- CRM implementation completed
 - On time
 - On budget
- The Social CRM equation changed...
 - From: “What the heck do we do with Social??”
 - To: “Once we decide what Social means....gosh its gonna be easy!”

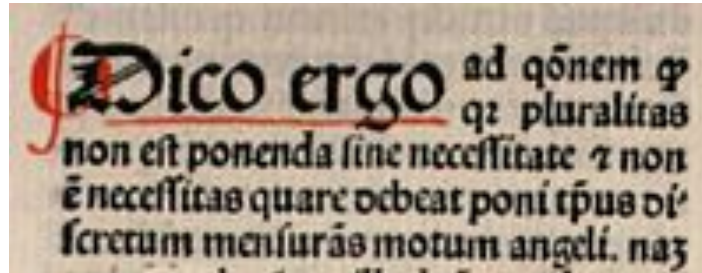
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Occam's Razor: Starting the Social Journey



“Plurality is not to be posited without necessity”

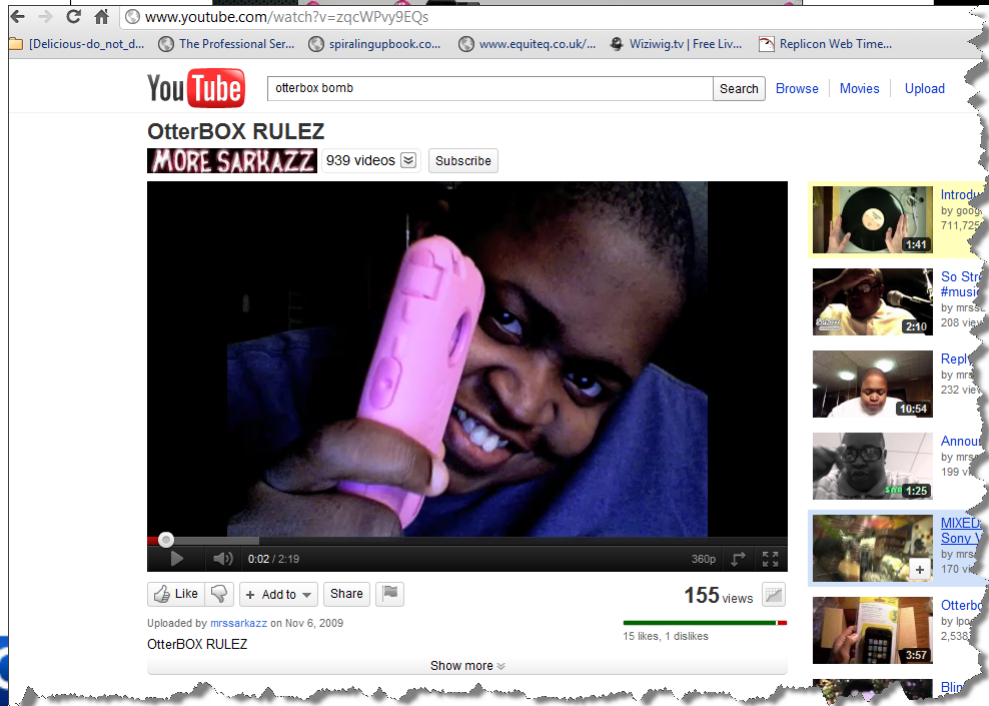
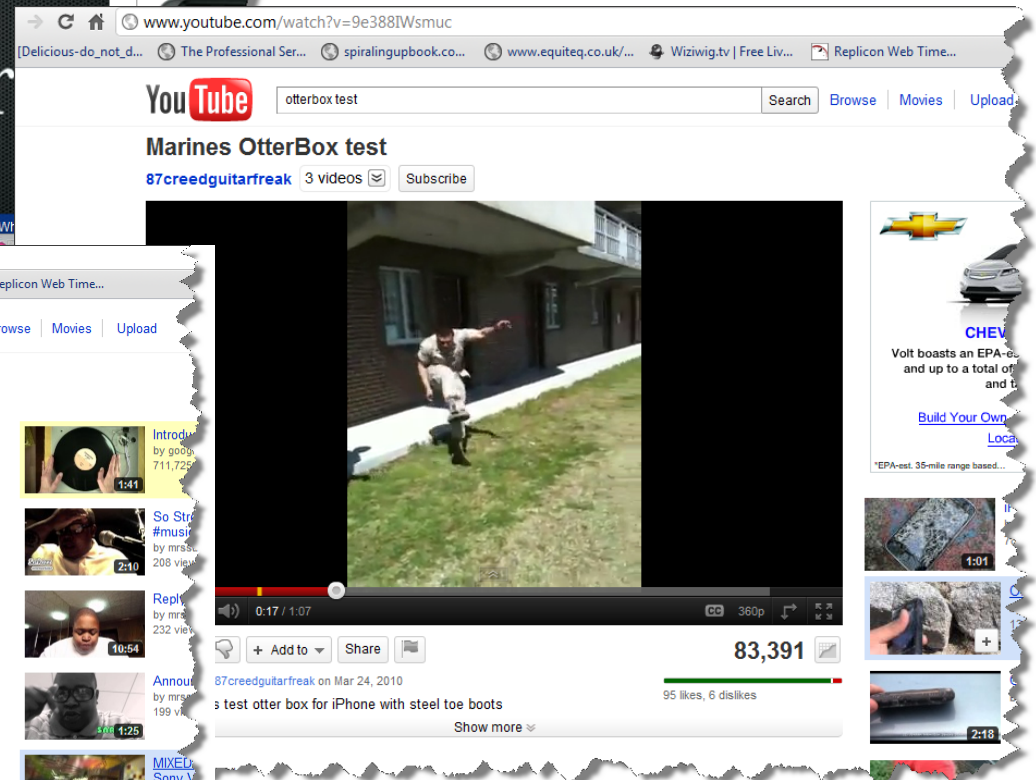
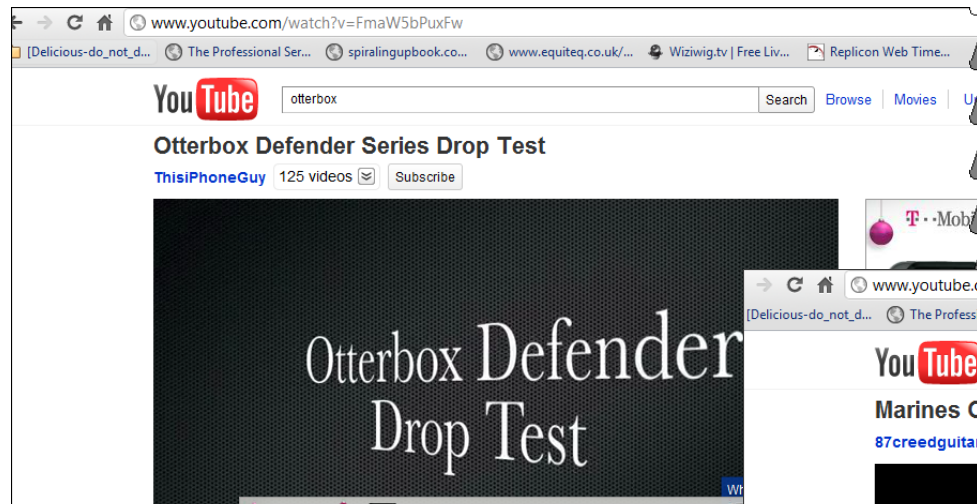
- Otterbox realized that the Social universe already had its brand in its hands...
- The Social equation was pretty simple – but the hard part was embracing its simplicity
- The easiest answer for Otterbox, is turning out to be the right one.

OtterNation

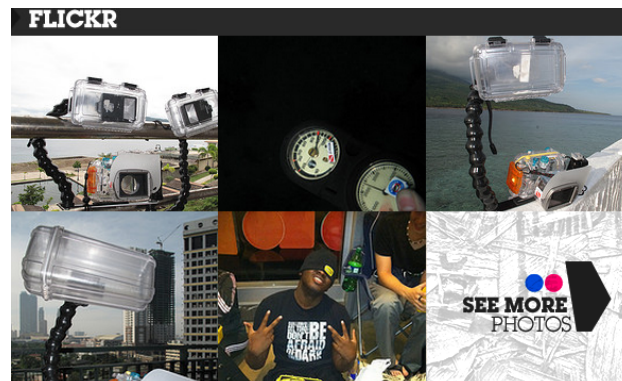
- Otterbox concluded “painfully”
 - People are already talking about their Otterboxes
 - People are already complaining about their Otterboxes
 - People are already looking for other members of Otternation to share their quirky stories of how they dropped the Otterbox off a cliff and the iPhone survived
 - Our customers are quirky...they're likely to congregate!
- Otterbox also realized – ***Social isnt always external...its right here in the building too.***
- So the easy answers are
 - Go talk to OtterNation, and offer them a nice cozy place to live and interact!
 - Make it as easy as possible for us to do business amongst ourselves!

DUH!

OtterNation



OtterNation 2011 – Building the homes...



TWITTER

evennorbury Glad you like it!
reply • retweet • favorite

ry @OtterBox love it
reply • retweet • favorite

kind words! Glad we could help!
12 minutes ago • reply • retweet • favorite

OtterBox @mikeyroks What happened?
11 minutes ago • reply • retweet • favorite

OtterBox @sand_man2012 We do have a great warranty! email customer.service@otterbox.com or call 855-688-7269!
11 minutes ago • reply • retweet • favorite

OtterBox @macguyca We will have a Nexus case soon! Keep an eye out!
11 minutes ago • reply • retweet • favorite

OtterNation – “SocialInside”

- Identify the holes inside the business that prevent us from supporting the nation...
 - Do we collaborate well enough?
 - Do we provide tools to understand the story? (i.e. analyze the data?)
 - Do we have tools that help us reach out and touch our business partners?
 - How do we control costs globally?

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Otterbox' Social Journey – 2012 Wiring the Homes!

- This wiring project involves
 - Wiring to the “Community”
 - Wiring within the “House”
- The keys
 - Collaboration inside Otterbox
 - So what if we hear about a social “revolution”...if we cant talk about it inside...what can we do about it?
 - Analytics
 - With social...you're talking about an explosion of data
 - We need to make sense of it...in real time...in an IT infrastructure environment that is flexible.
 - CRM to Social
 - We must connect our CRM tools to the OtterNation
 - The phone is one medium...the Blog, Flickr, Youtube, Twitter and Facebook are “channels”
 - The goal isnt to dominate the channels....its to make sure the channels are connected to the Otterbox.

2012...what's it look like

- Team collaboration solutions
 - Sharing
 - Meetings
 - Integration to CRM
- Analytics
 - Real BI! Not just excel and SQL
- SugarCRM connectors to the OtterNation
- ***The good news...IBM and SugarCRM have all the tools...***
- *...all we have to do is get out of our own way*

Conclusions

- Social CRM is already happening
- The two key challenges are:
 - Figuring out how to simplify your approach to Social...which is easy..but non intuitive
 - Hoping the your platform enables all of the “connectors” you need to have

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Conclusion

- Think “Occam”.
 - The simplest answer is the right one.
 - Connect to the organized external communities
 - Connect your internal community
 - Provide a home for communities internal and external...if they don't exist.
 - Wire them up....
- Think SugarCRM and IBM
 - Flexible
 - Powerful
 - Comprehensive
 - Open

Gratuitous Plug for Levementum

- SugarCRM's largest integrator (2010/2011)
- SugarCRM and IBM partner
- Offices
 - Boston
 - Phoenix
 - Portland
 - Green Bay
 - Sydney, Australia

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Lets talk!

- 2 day onsite CRM/Social discovery session...for free
- Geoffrey Mobisson
- Managing Director
- Levementum
- gmobisson@levementum.com
- 480 320-2520

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Agenda



#IBMSocialBiz #sugarcrm

- Keynote: Brian Vellmure

- Customer Testimonial

----- Coffee break -----

- The New Rules and Best Practices of Social CRM (*Sugar*)

- From Social Media to Social CRM: Best Practices for Becoming a Social Business (*IBM*)

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- A Day in the Life of the Social Business

- Question and Answer Session





#IBMSocialBiz #sugarcrm

Coffee Break and Networking

Chuck Coulson

VP Business Development

SugarCRM



Agenda



#IBMSocialBiz #sugarcrm

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- The New Rules and Best Practices of Social CRM (*Sugar*)

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#IBMSocialBiz #sugarcrm

The New Rules and Best Practices of Social CRM

Nick Halsey

CMO and EVP Corporate 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.”

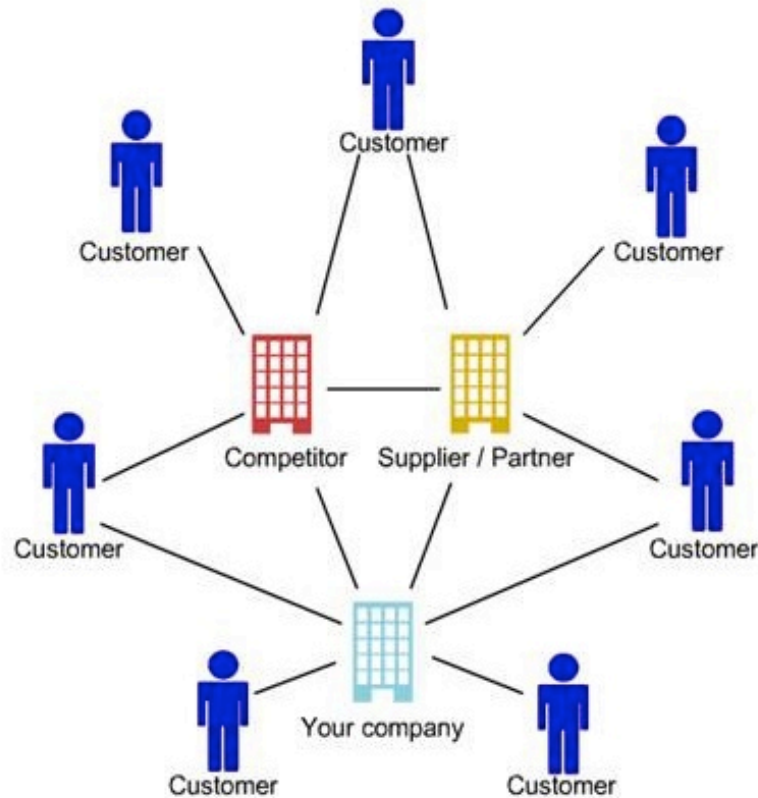
Change

SPONSORED BY

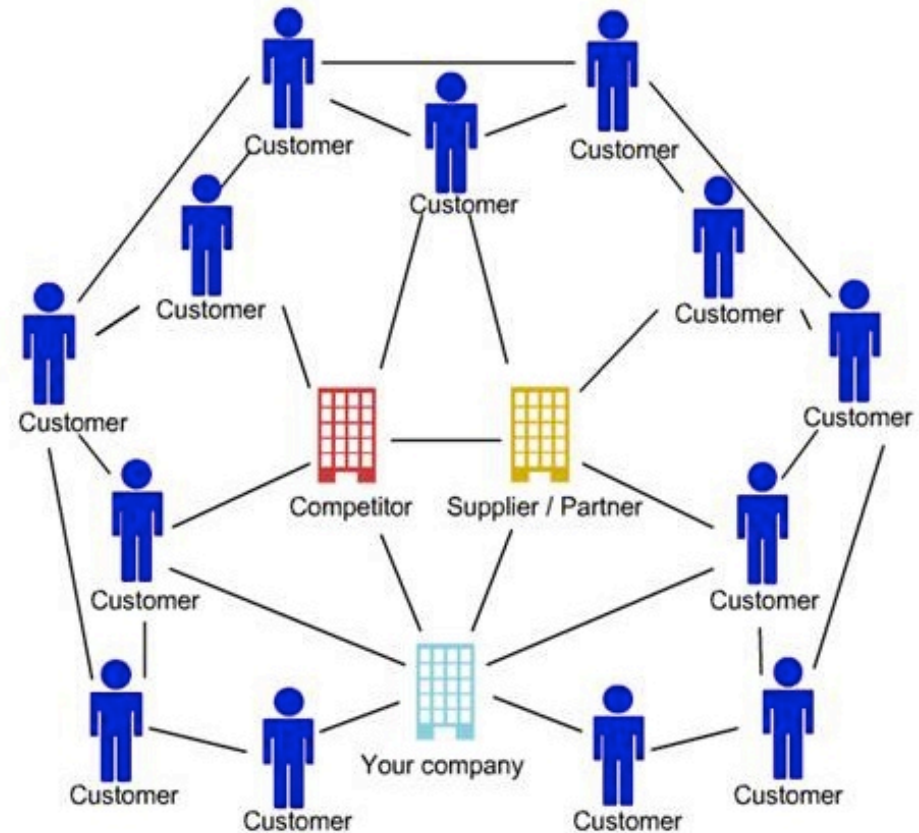


Change: Customers Believe Customers Not Companies!

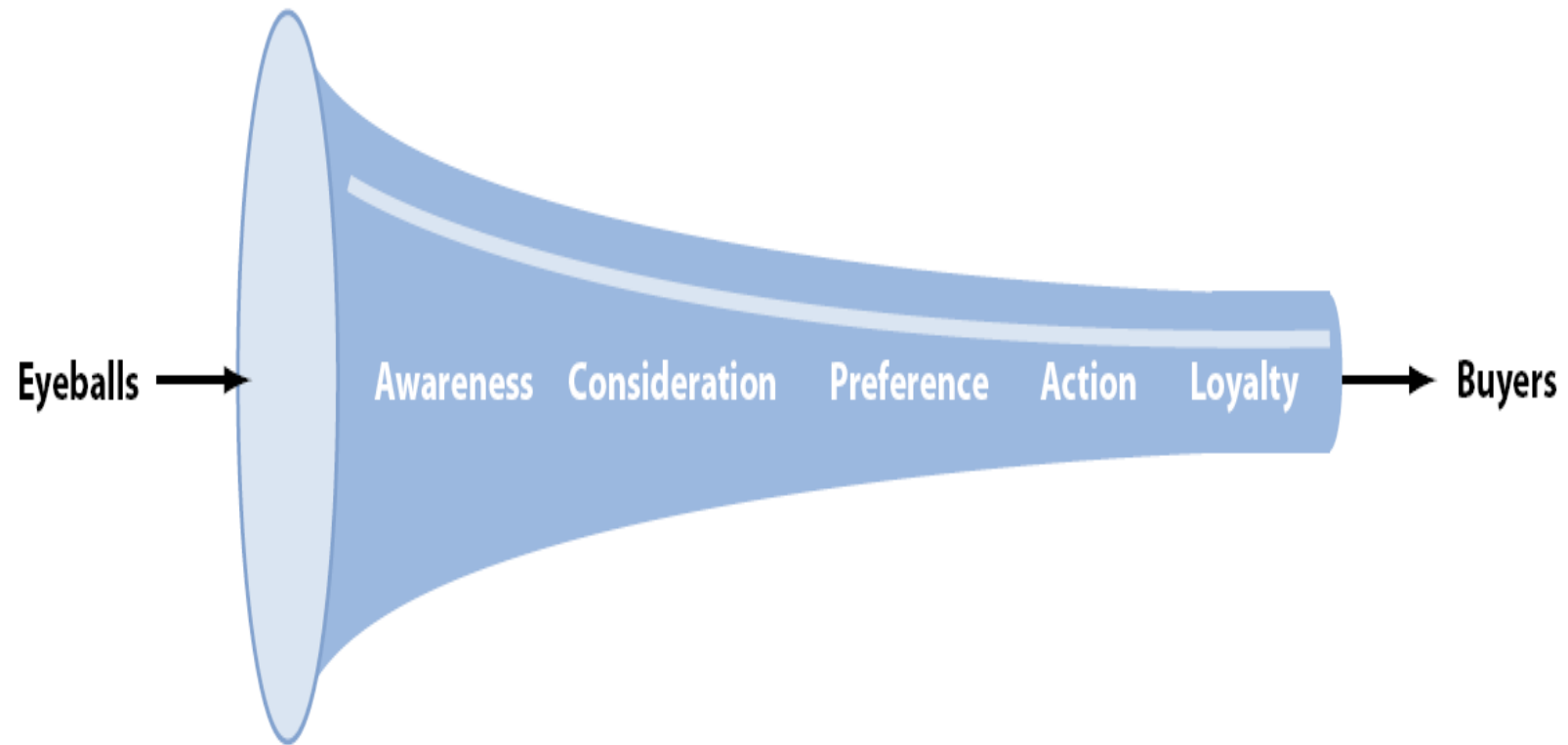
Old World CRM



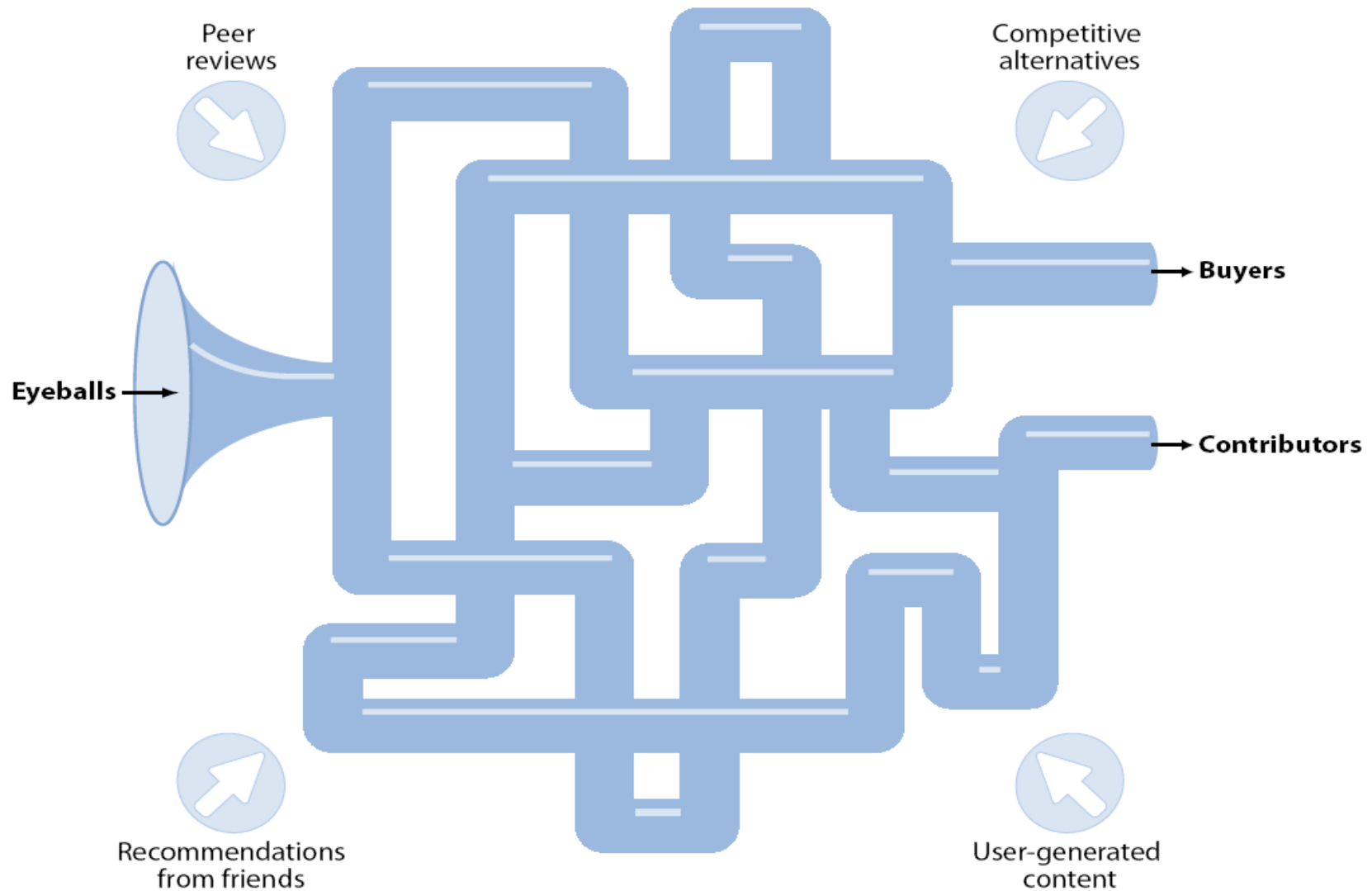
Social CRM



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

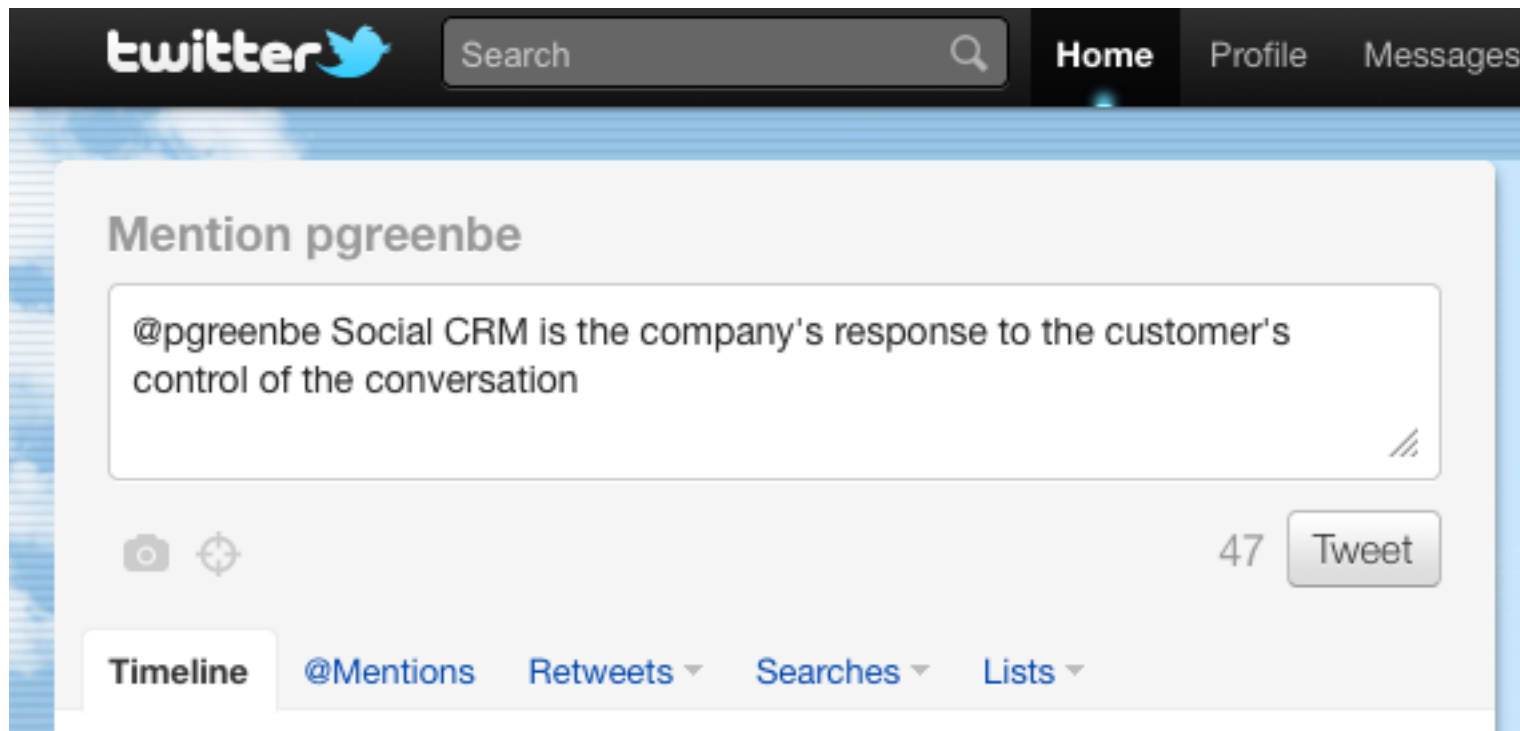
17 videos

Subscribe

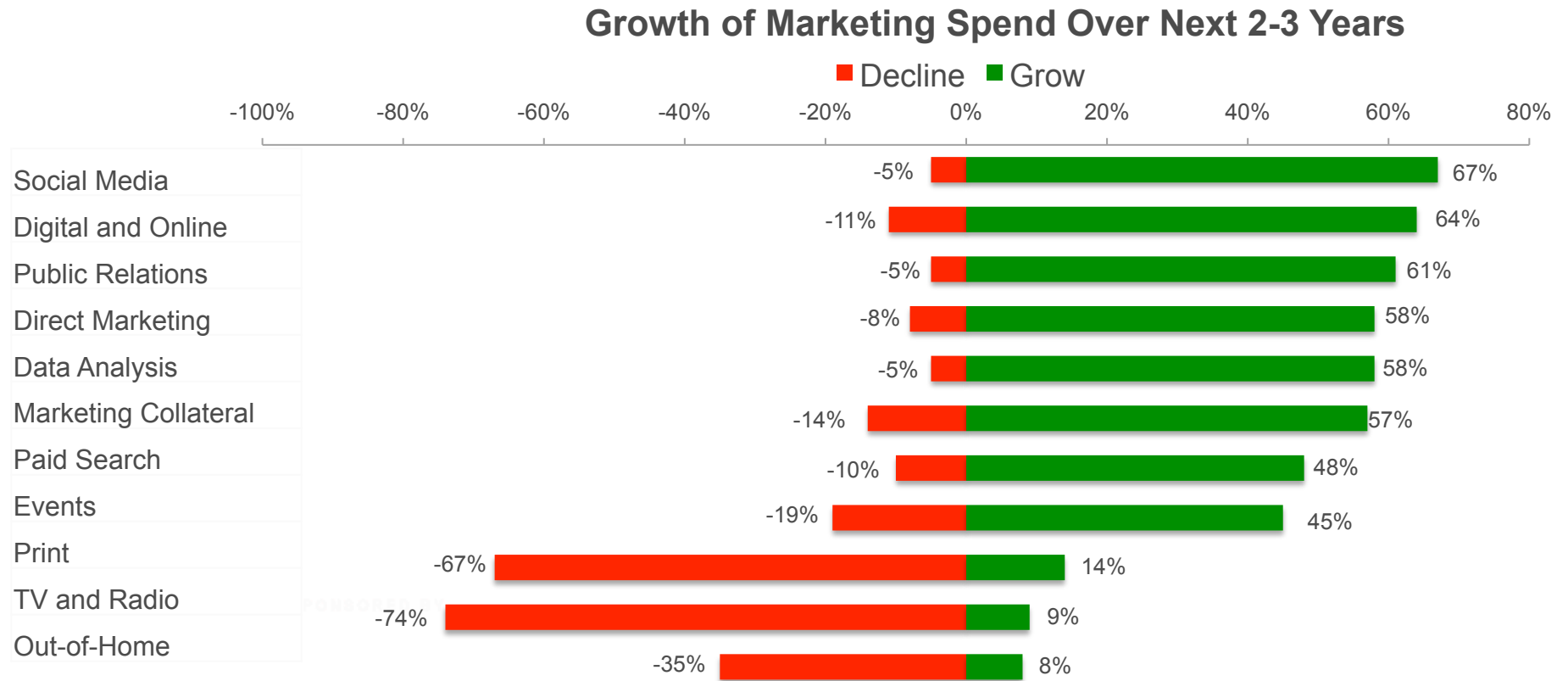


10,836,195

Customers Manage You

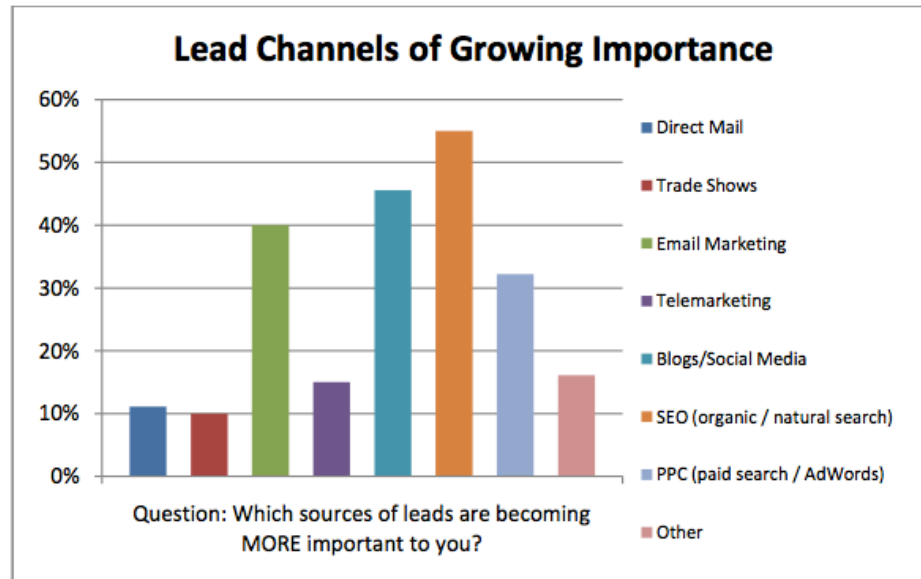


Rule #2: Traditional Marketing is Declining

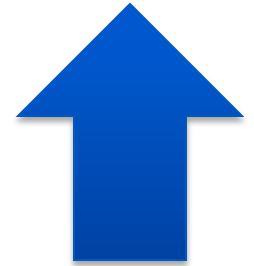


Source: Booz & Company's B2B Marketing Survey 2010

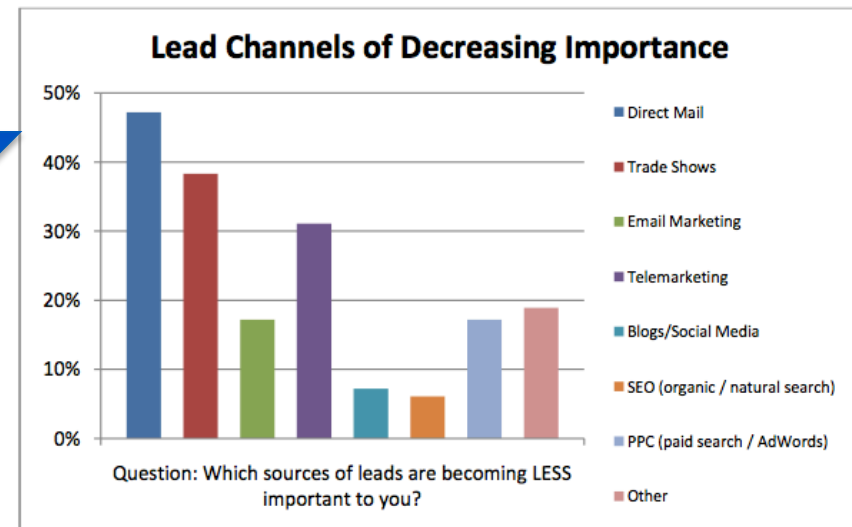
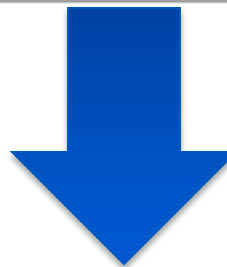
How People Connect with Companies



Inbound
Permission
Customer-Driven



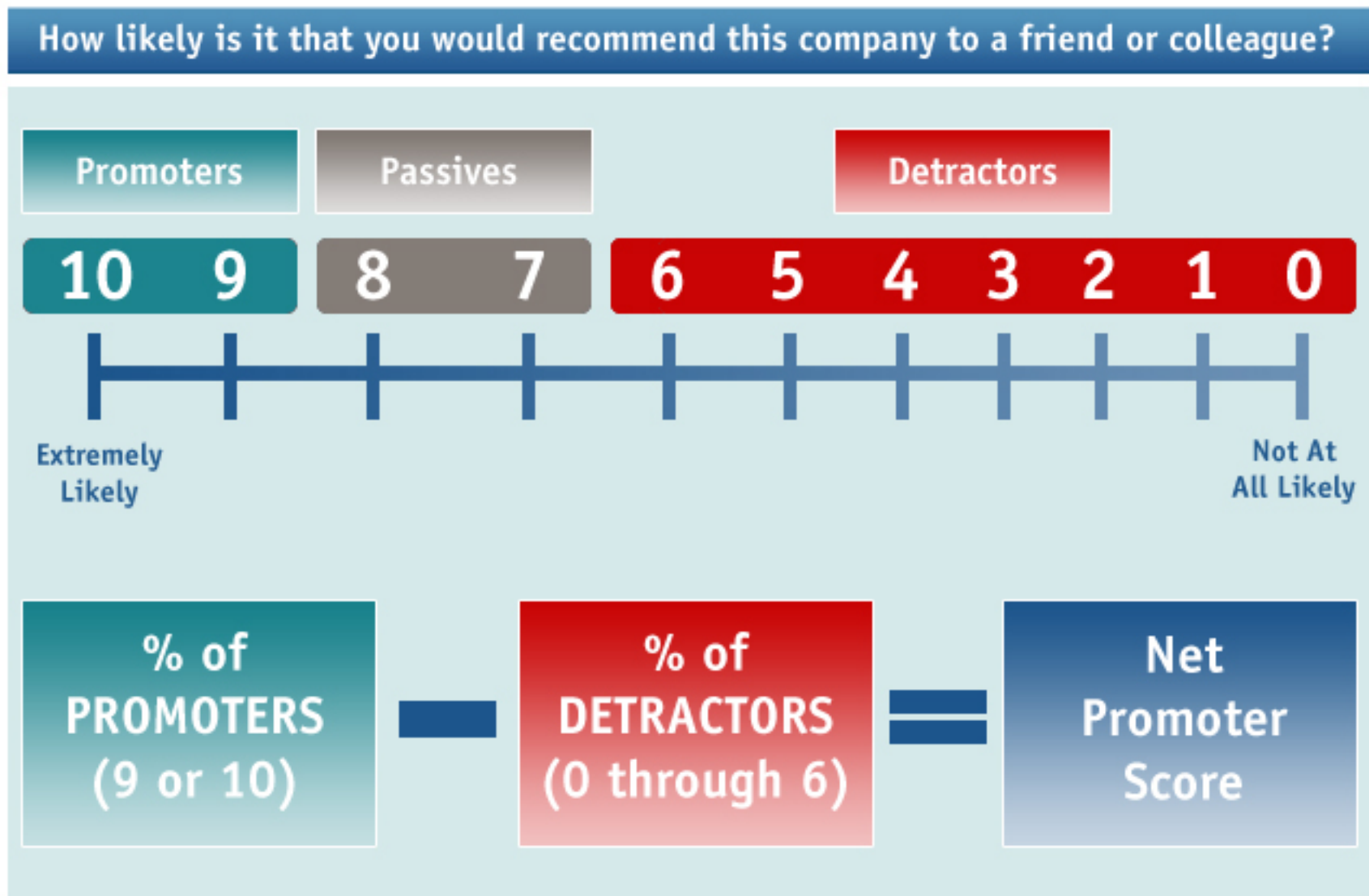
Outbound
Interruption
Vendor-Driven



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.

Ads by Google

DT Virtualization Webinar - Don't Miss Intel's IT Manager Peer Research on Desktop Virtualization!
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.

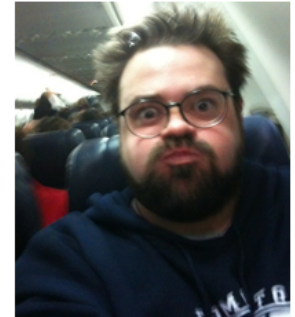
The incident, which took place on Saturday, resulted in dozens of Tweets on [Smith's account](#) (he has 1.6 million followers at the time of writing). A brief sampling:

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”

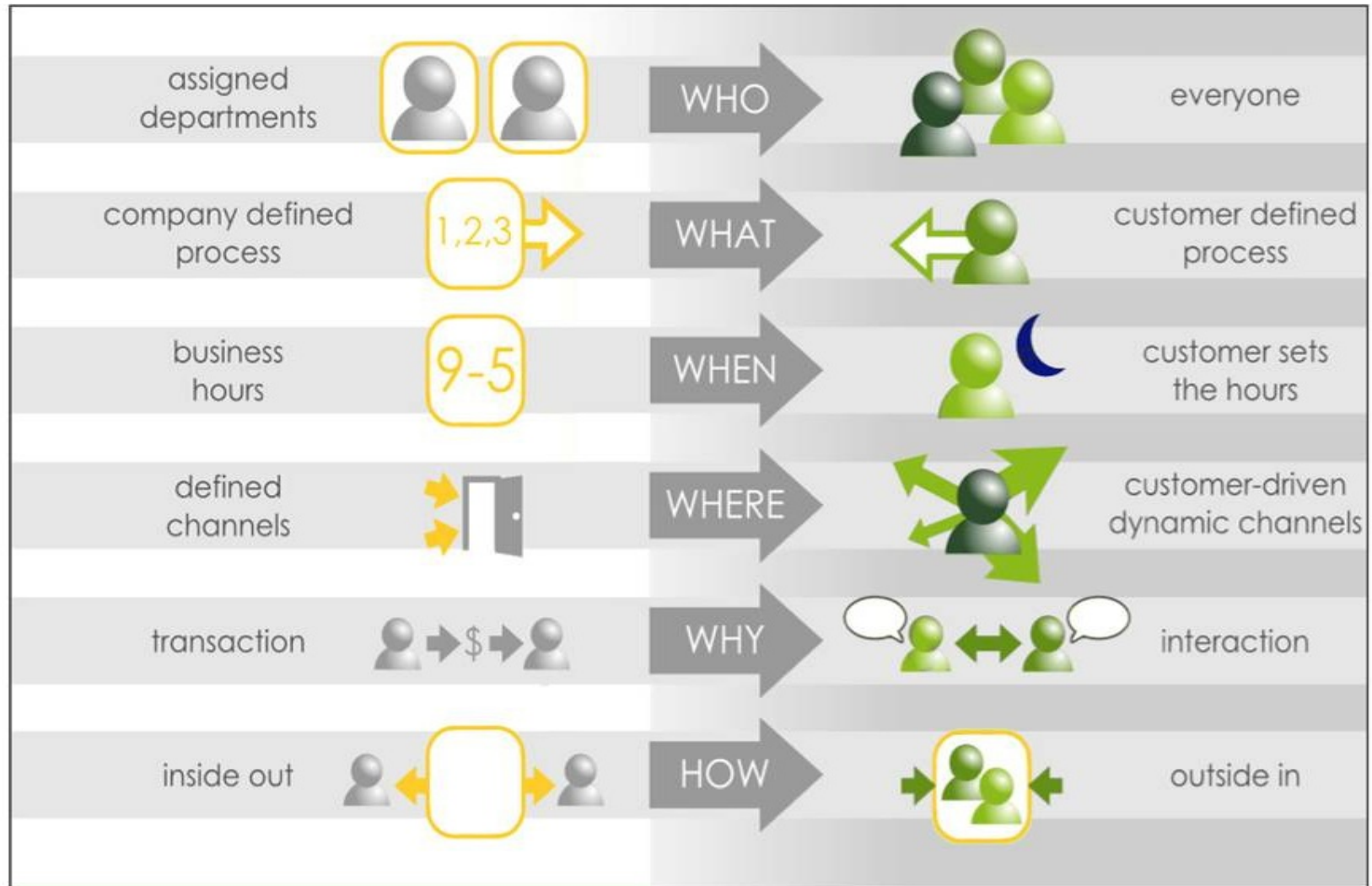
Rule #5: Integrate People with Technology



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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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

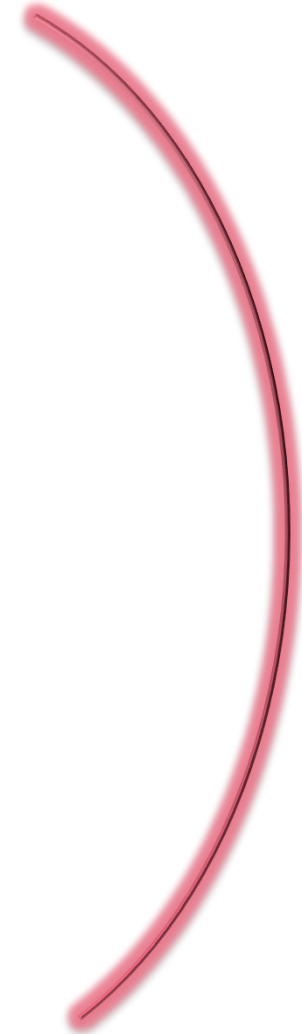


SALES

CUSTOMER
SERVICE

CALL
CENTER

MARKETING



SPONSORED BY

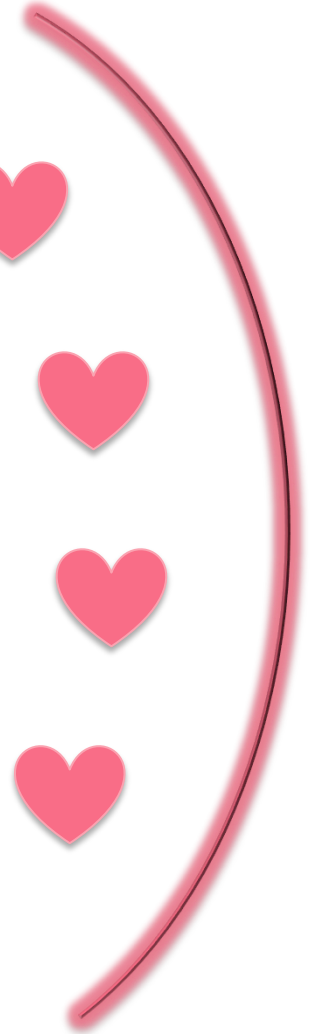
Social CRM: Enable the customer edge

INNER CORE

SALES EDGE

PARTNERS

CUSTOMERS



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Basics of an Open, Social CRM



Question:

What is the Social CRM interface of the future?

Answer:

The **social networking** site of choice







combined with



SPONSORED BY

An **open** CRM system



Hillel Uses Social CRM to Connect with College Students










facebook    Steve Kaz Home 

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

REACH Login

Username:

Password:


 **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

Fully Integrated with Sugar

The screenshot displays the Hillel REACH Relationship Management interface. At the top, a navigation bar includes icons for home, people, student interactions, events, Hillel, universities, reports, expenses, and tag categories. The main header identifies the organization as "Hillel: The Foundation for Jewish Campus Life" and the system as "REACH Relationship Management". A user login bar shows "Welcome, Lee Johnson" with links for "Log Out", "Training Videos", and "Help".

The interface is divided into several sections:

- Left Sidebar:** Features a "facebook" section with links to "Profile" and "Wall Post", and a "My Facebook Engagees" list including Stephen Kazman, Rory Thayers, Ethel Kasinetz, Andrea Hoffman, Dave Adam, Joan Arkins, and Eric Aarons.
- Top Navigation:** Includes tabs for "Home", "People", "Student Interactions", "Events", "Hillel", "Universities", "Reports", "Expenses", and "Tag Categories".
- Profile Header:** Shows a profile picture of Kathy Allen, her name, email "kathy@test.net", and an "Edit" button.
- Student Information:** A section titled "STUDENT" containing fields for Gender, Birthdate, Jewish status, Birthright Eligibility, Class Of, Major, Dorm, Student ID, FERPA Hold, Other ID, and Primary Team. The Primary Team is listed as "Hillel at South Harmon Institute of Technology".
- Address and Notes:** Fields for Address, Notes, and Date Created (09/27/2011 09:34am by Lee Johnson).
- Engagers:** A section titled "Engagers (1)" showing "Lee Johnson" with "No Interactions".
- Interests:** A section titled "Interests" showing "No Data".
- Immersive Experiences:** A section titled "Immersive Experiences" showing "No Data".
- Recent Activities:** A section titled "Recent Activities" with sub-sections for "Interactions", "Next Steps", and "Events", all showing "No Data".

And Mobile CRM

Hillel: The Foundation for Jewish Campus Life
REACH
Relationship Management

Select a module
Student Interactions

Student Interactions:

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.

[Home](#) | [Back](#) | [Create Person](#) | [Log Out](#)

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

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

Where Do You Start?



Think Big
Start Small
Move Fast

CRM of the Past

HOME

ABOUT



3

Search



Wall

Info

Friends

Friends (326)



Build Your Cloud

Simple. Cool. Effective. Open Source.

Crash Course in Open Source Cloud Computing

Build and manage clouds with free and open source tools

Mark R. Hinkle

VP of Community at Cloud.com

Studied Mechanical Engineering at University of Pittsburgh

From Cary, North Carolina

Add as Friend

Education and Work

Employers



Cloud.com

VP of Community · Nov 2010 to Present



Cloud.com

VP of Community · Nov 2010 to Present



Zenoss, Inc.

Vice President · Oct 2006 to Nov 2009

http://ow.ly/4hAsx #foss #opensource This happened about 14 hours ago

Mark R. Hinkle Red Hat financial revenue increases 25% YoY - http://yhoo.it/higIpx - Good steady growth continues #moneyinopopensource This happened about 16 hours ago

can read my bio.



SOCIAL SOFTWARE

Crash Course in Open Source Cloud Computing

by MARK on MARCH 14

My slides from my SCALE 9x, it was a great feedback I think I will be using. On the open source side, I am also on the advisory board for MCollective for open source collaboration.

Crash Course in Open Source Cloud Computing

SEARCH & SOCIAL MEDIA

CRM of the Future ... Here Today

iPad 5:50 PM 52%

Mark Hinkle » Contacts » SugarCRM - Commercial Open Source CRM

demo.sugarondemand.com/jsysmans_vert/seed1/Preview620/inde... Google


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

Home Accounts **Contacts** Opportunities Reports Documents Cases All

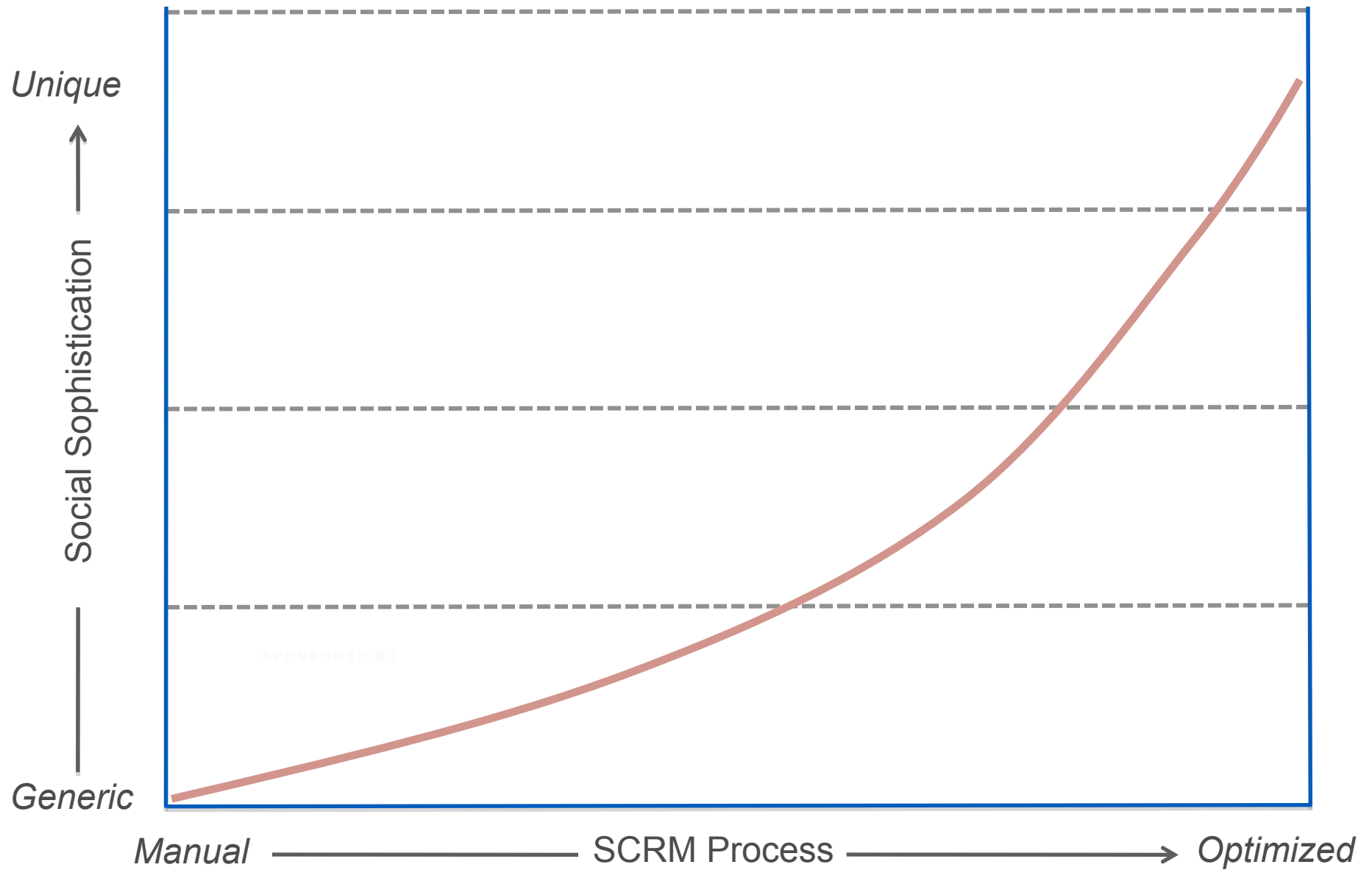
» Mark Hinkle ☆ Create

Edit Duplicate Delete Find Duplicates Get Data Manage Subscriptions View Change Log (4 of 243)

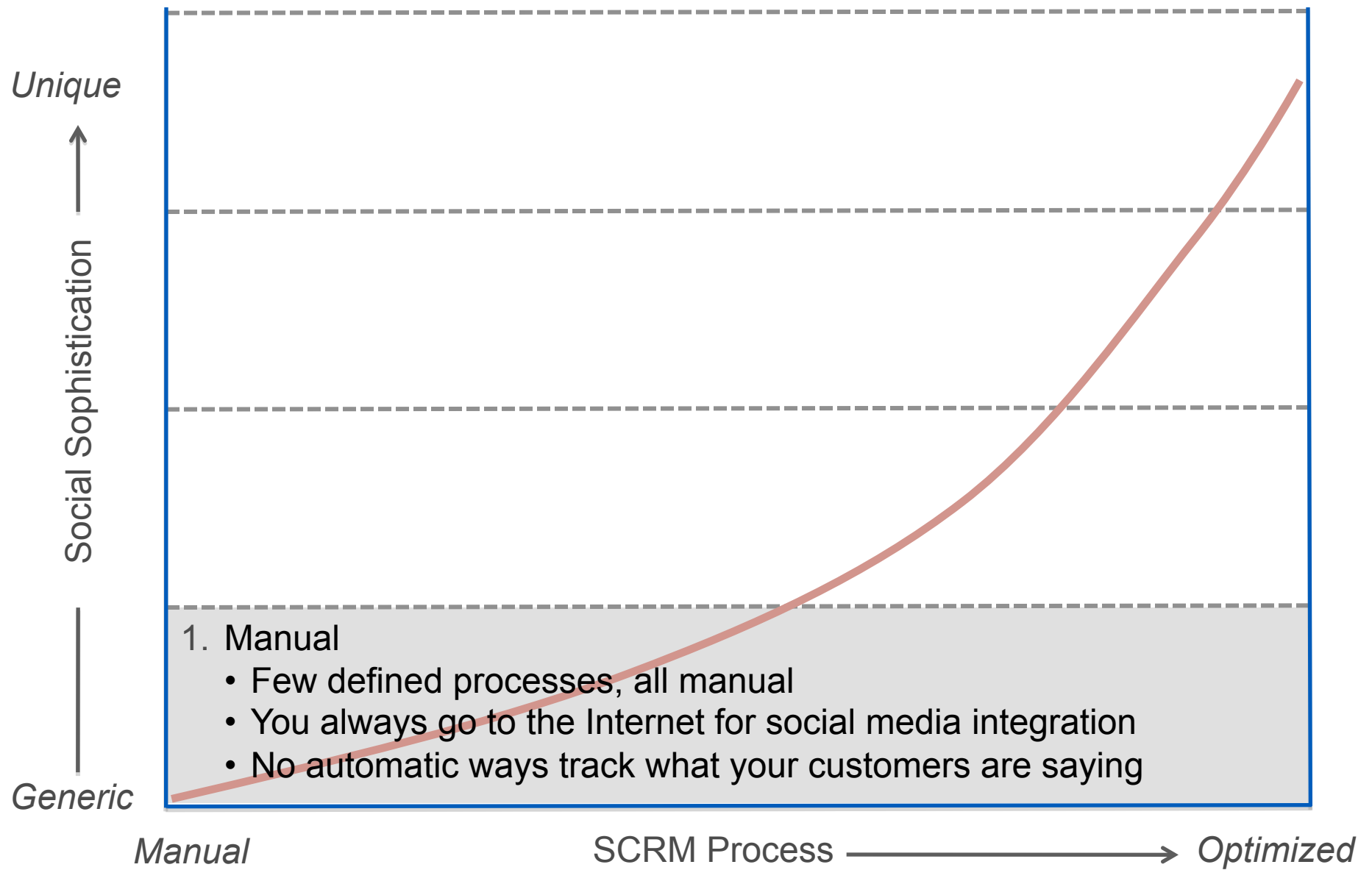
Contact Overview Address Information Map Blog Other Description Information Portal Information

First Name:	Mark	Office Phone:	+1 (919) 228-8049
Last Name:	Hinkle	Mobile:	+1 408 582 3475
Account Name:	Cloud.com	Home:	
Title:		Other Phone:	
Email Address:	mrhinkle@socializedsoftware.com (Primary)	Fax:	
linkedinprofile:	http://www.linkedin.com/in/markrhinkle	Birthdate:	
Twitter Name:	mrhinkle	Assistant:	
facebook:	http://www.facebook.com/mark.hinkle	Assistant Phone:	
Sync to Outlook@:		Reports To:	
Assigned to:	will	Picture:	

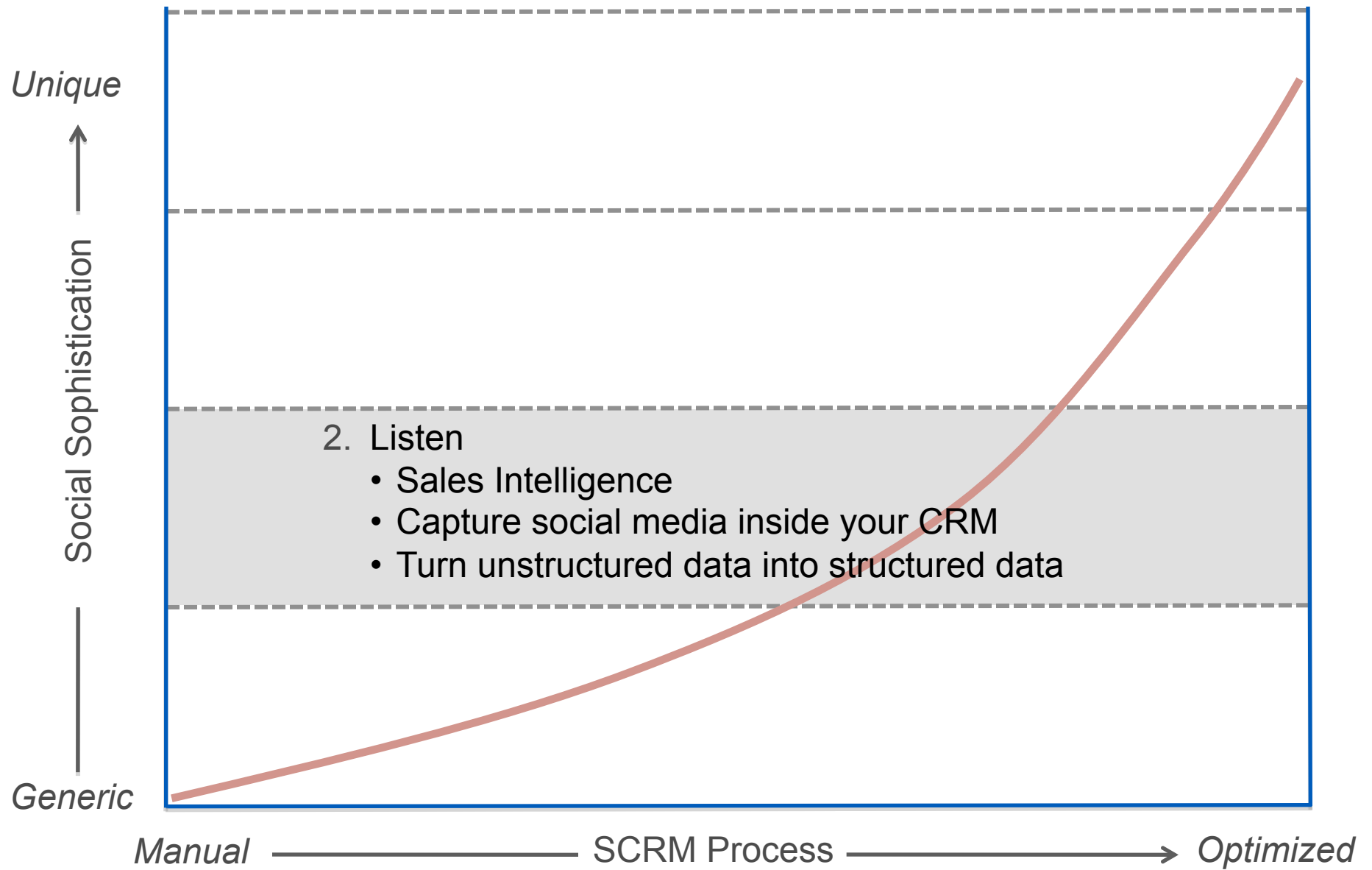
Social CRM Adoption Curve



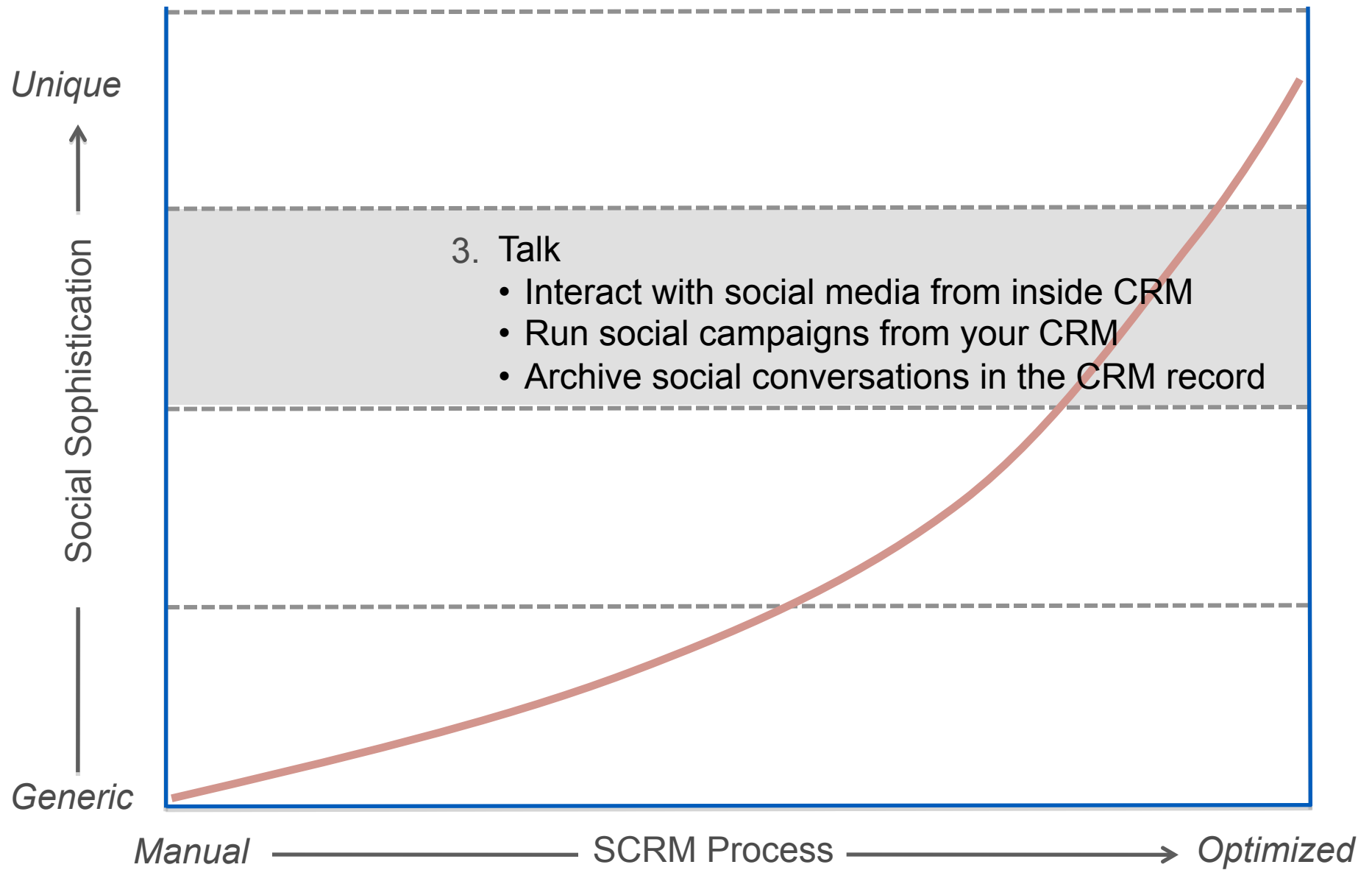
Social CRM Adoption Curve



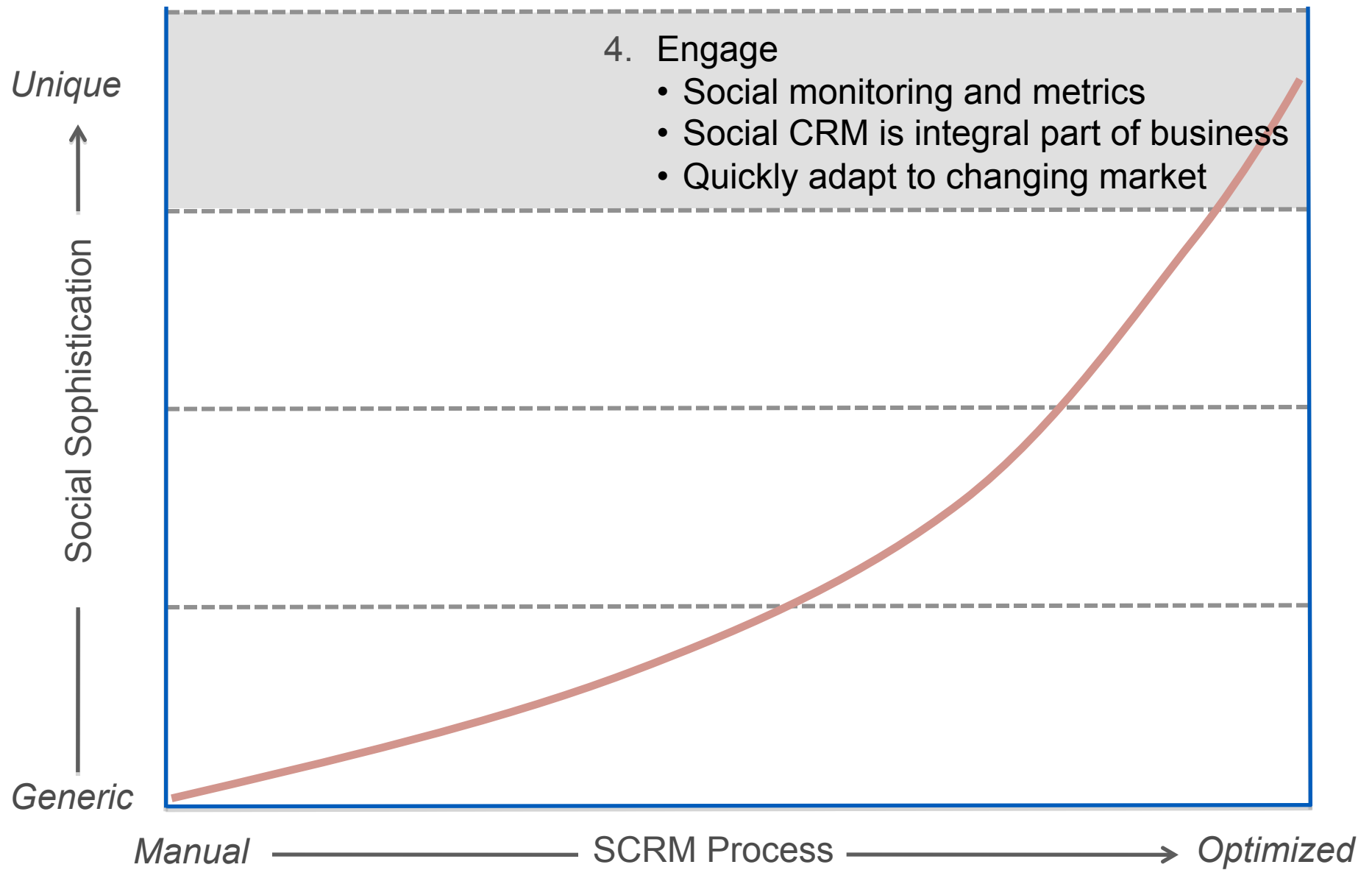
Social CRM Adoption Curve



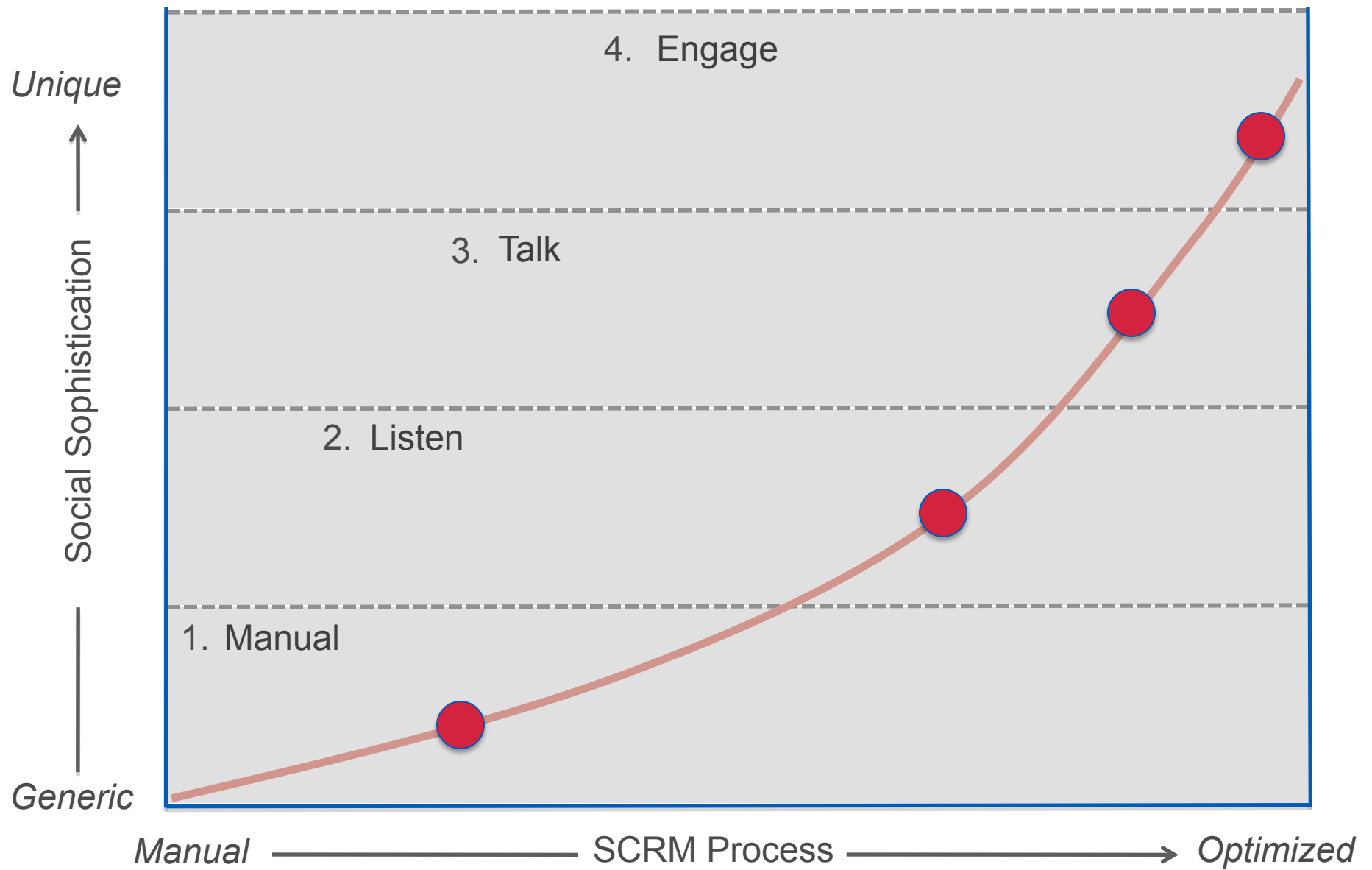
Social CRM Adoption Curve



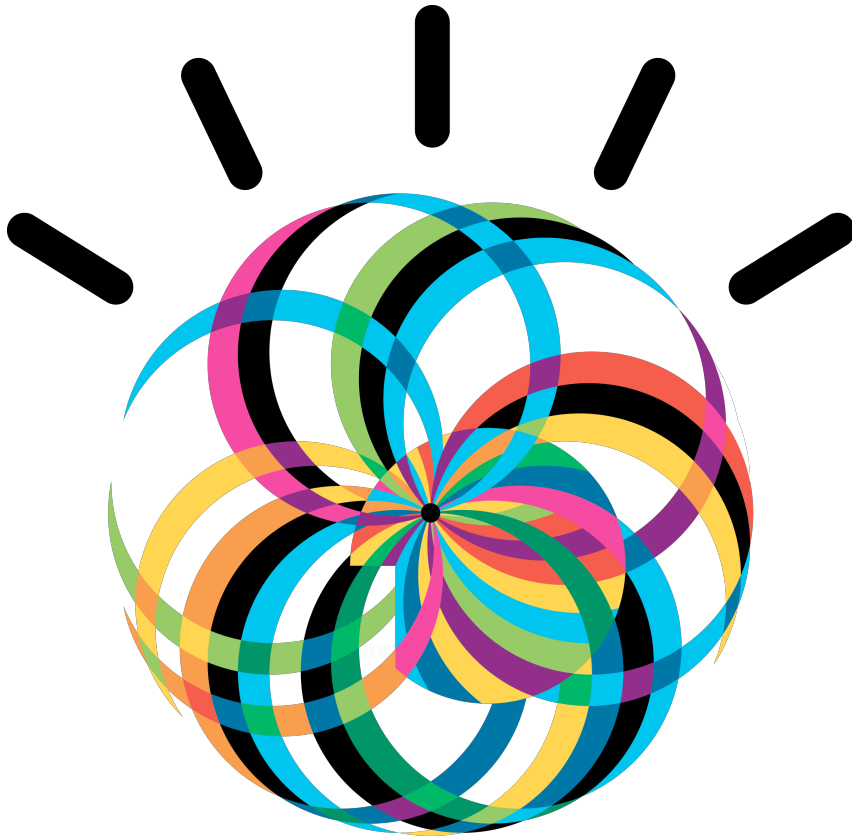
Social CRM Adoption Curve



Key to Social CRM is Following the Curve



Sugar and IBM Social Media Integration



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

Agenda



#IBMSocialBiz #sugarcrm

- Keynote: Brian Vellmure

- Customer Testimonial

----- Coffee break -----

- The New Rules and Best Practices of Social CRM (*Sugar*)

- From Social Media to Social CRM: Best Practices for Becoming a Social Business (*IBM*)

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- A Day in the Life of the Social Business

- Question and Answer Session





#IBMSocialBiz #sugarcrm

From Social Media to Social CRM, Best Practices to Becoming a Social Business

Erik Ostly

IBM Collaboration Solutions

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

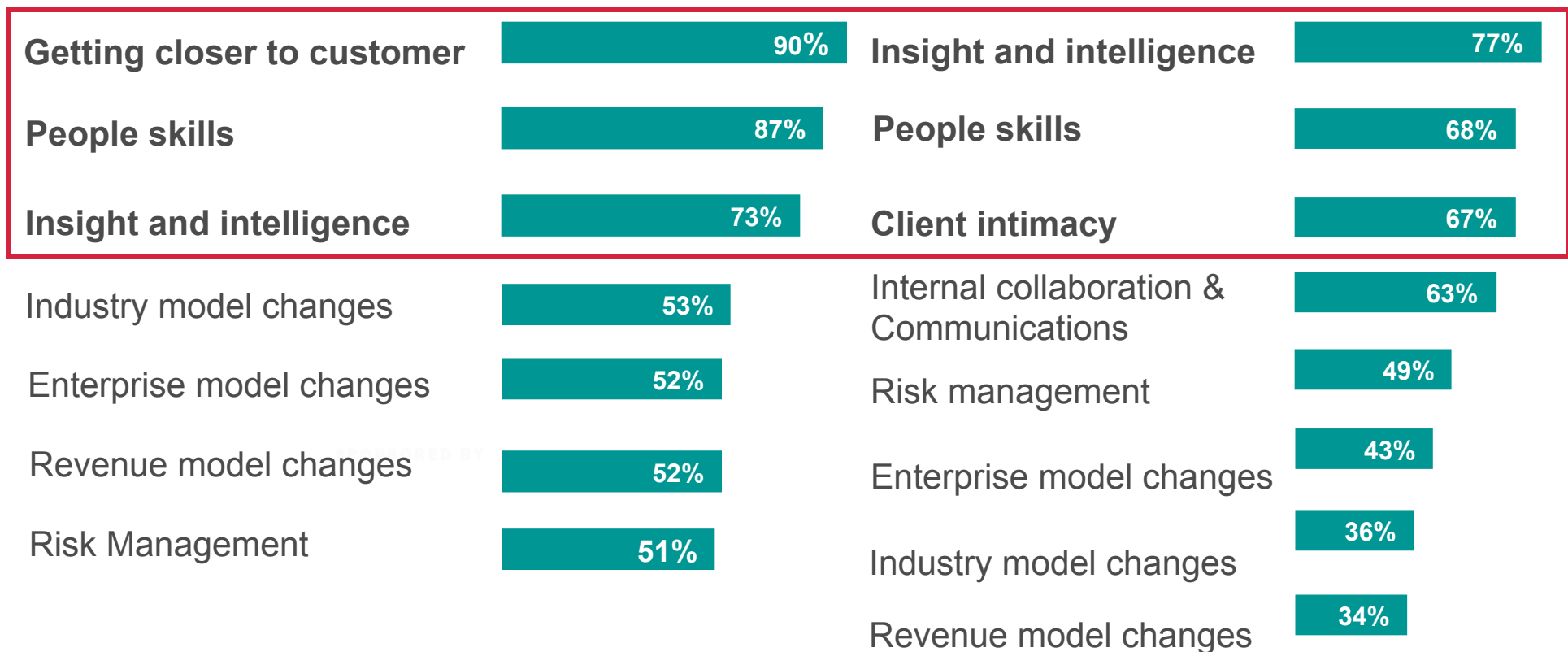


Note: This report is based on analysis done by the IBM Market Intelligence Department. This document is not meant to be a statement of direction by IBM nor is IBM committing to any particular technology or solution. Source: GMV Quarterly April 2011, total market

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

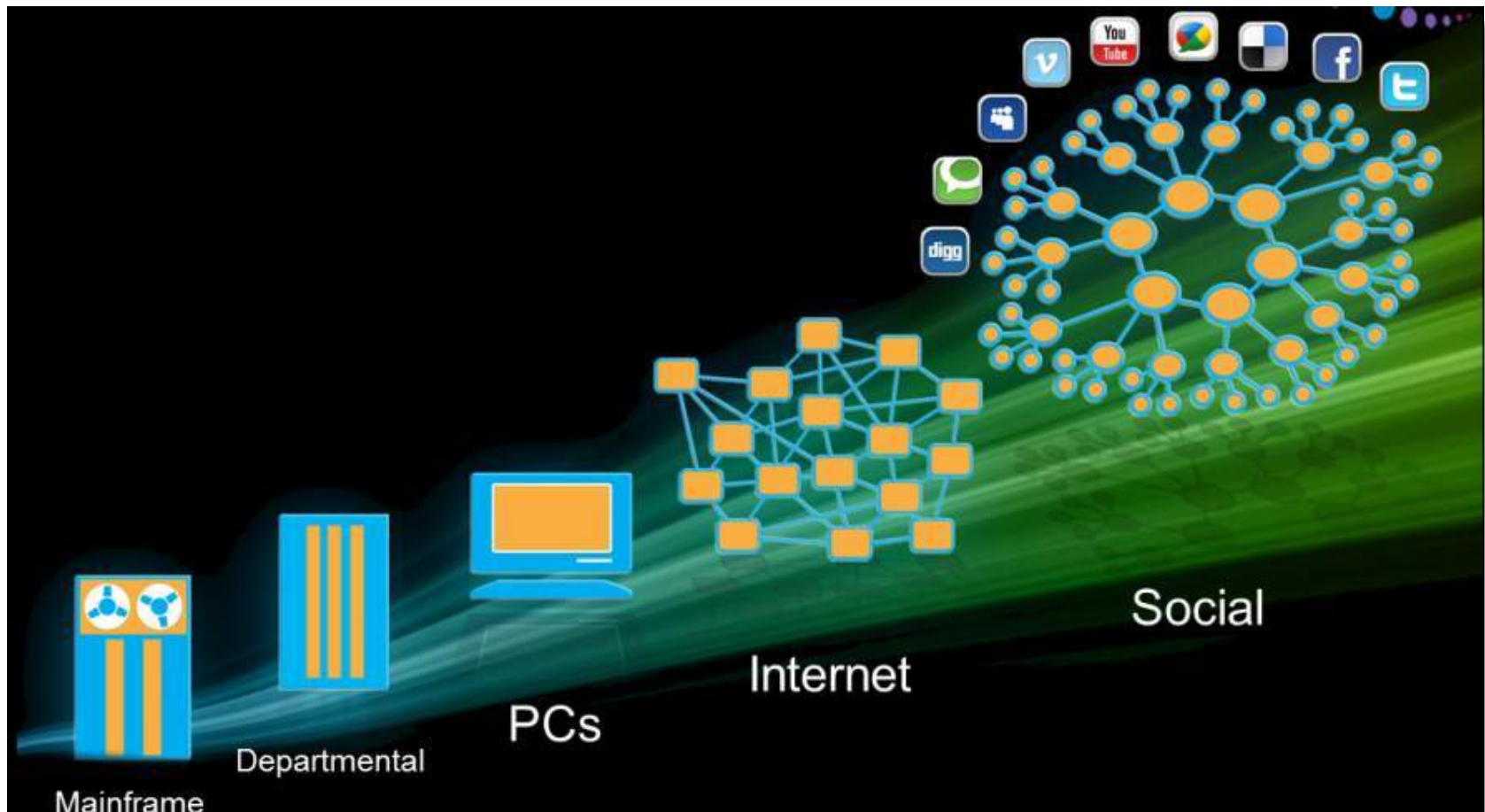
Midmarket CEO focus over the next 5 years

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



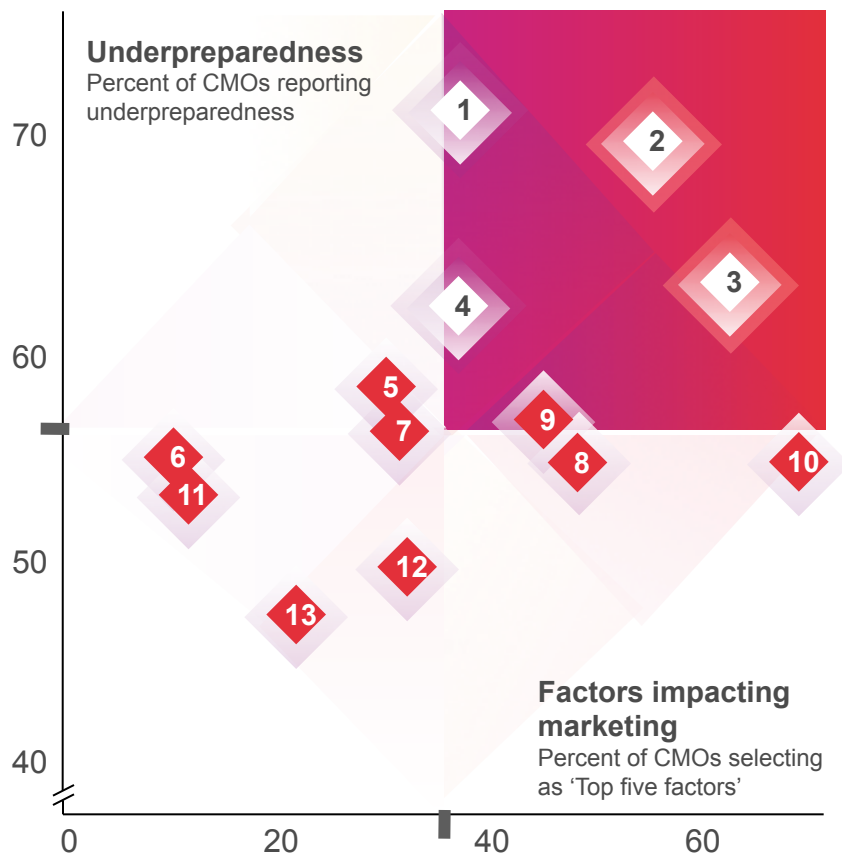
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"We saw an opportunity to engage Cold Stone's loyal customer base and social media following to drive a measurable impact on in-store sales."

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

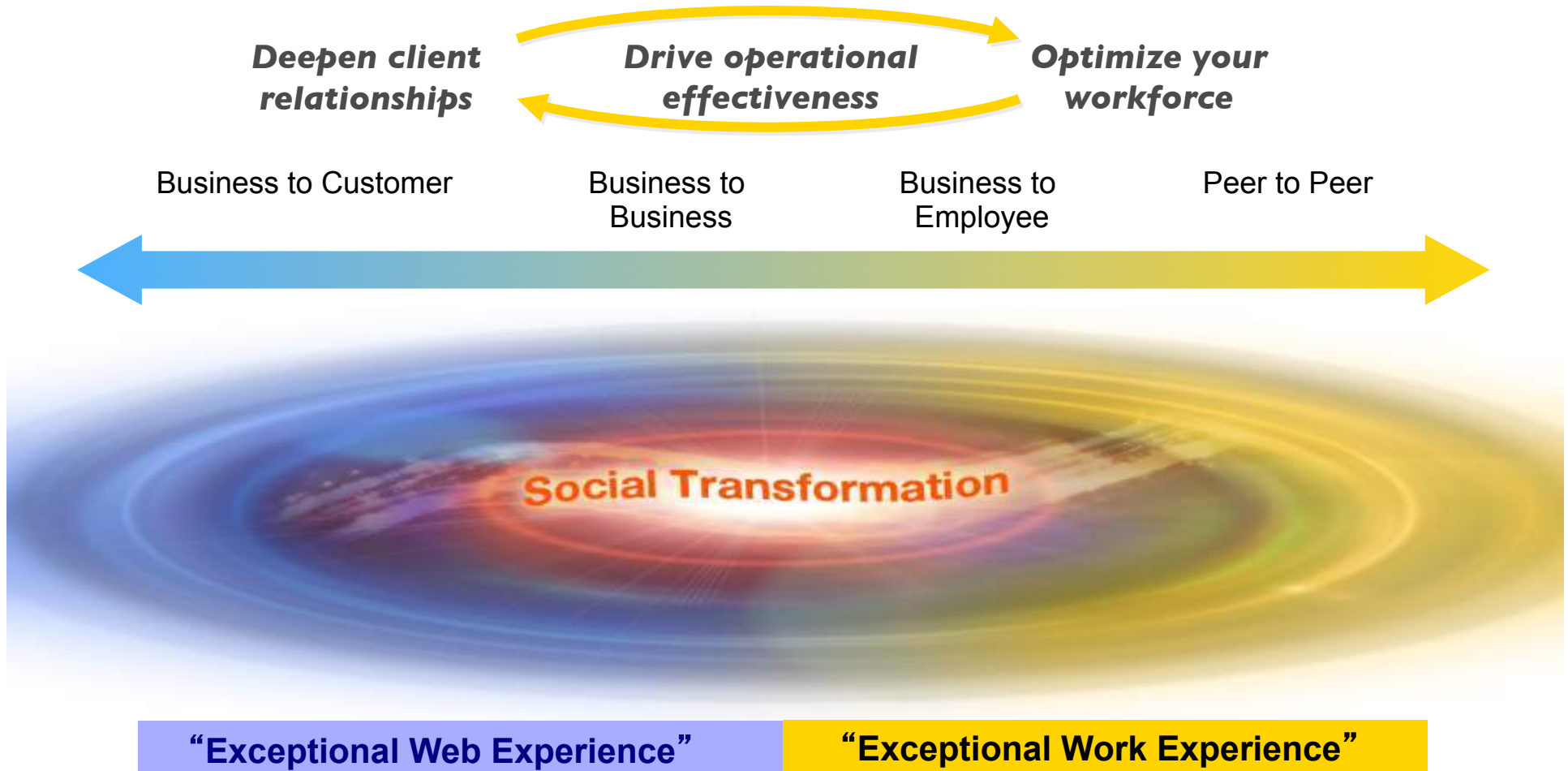
@davepeck uh oh...our last one out to
SFO leaves in about 5 mins....could you
fly into OAK or SJC? #sxsw

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!

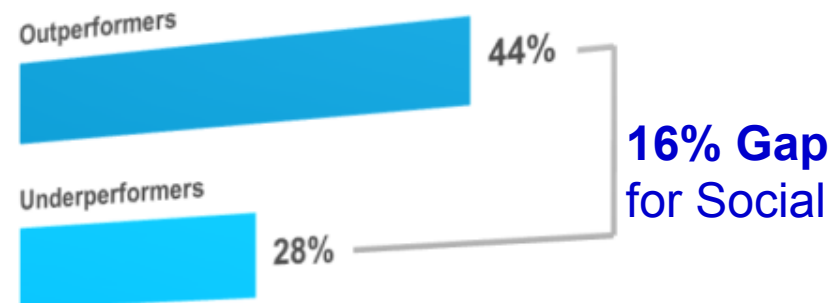
Characteristics of a
successful Social Business

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



**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

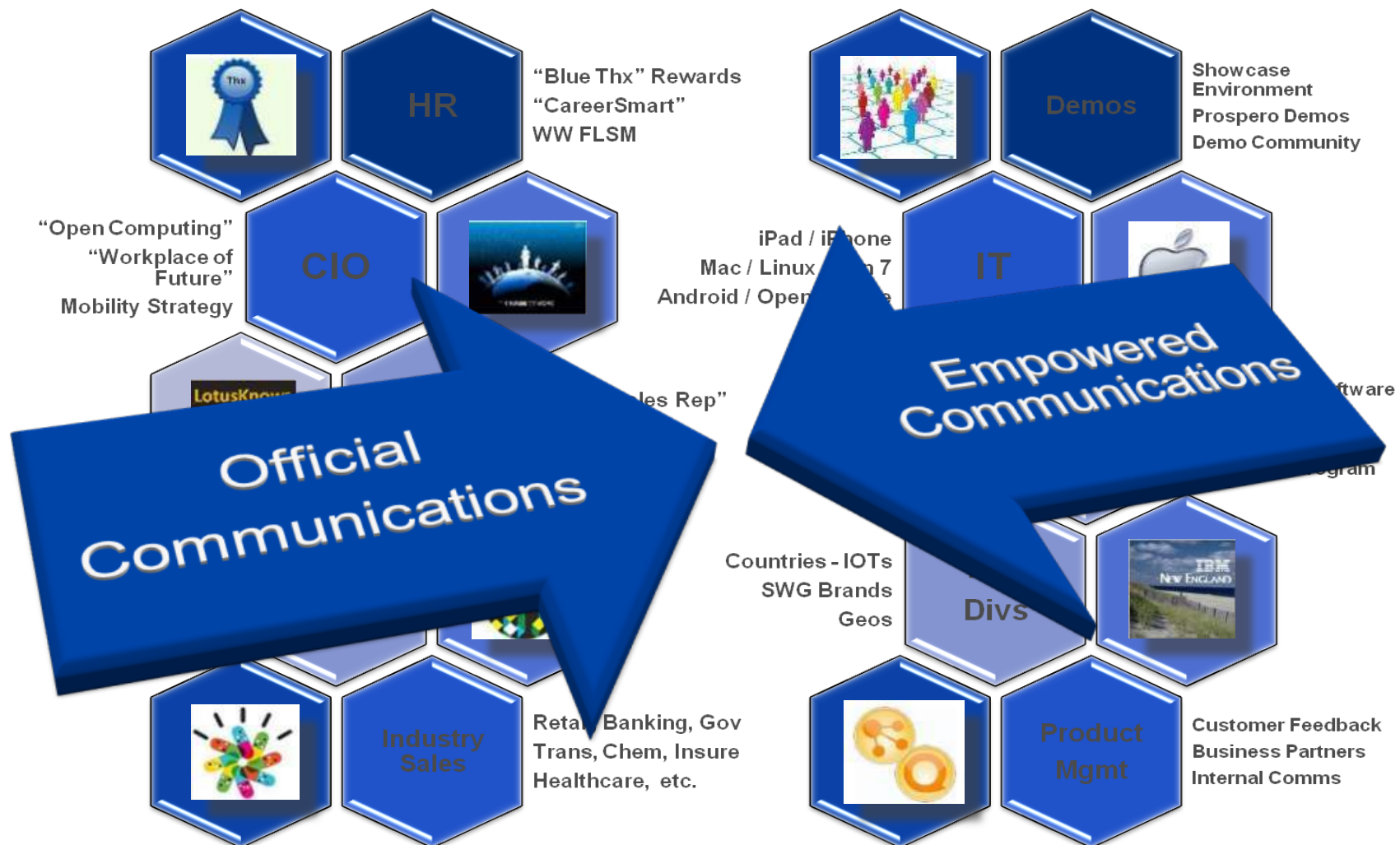
- Clients looking to increase customer retention, attract new customers and maintain competitive advantage

Advantage

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


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](#)



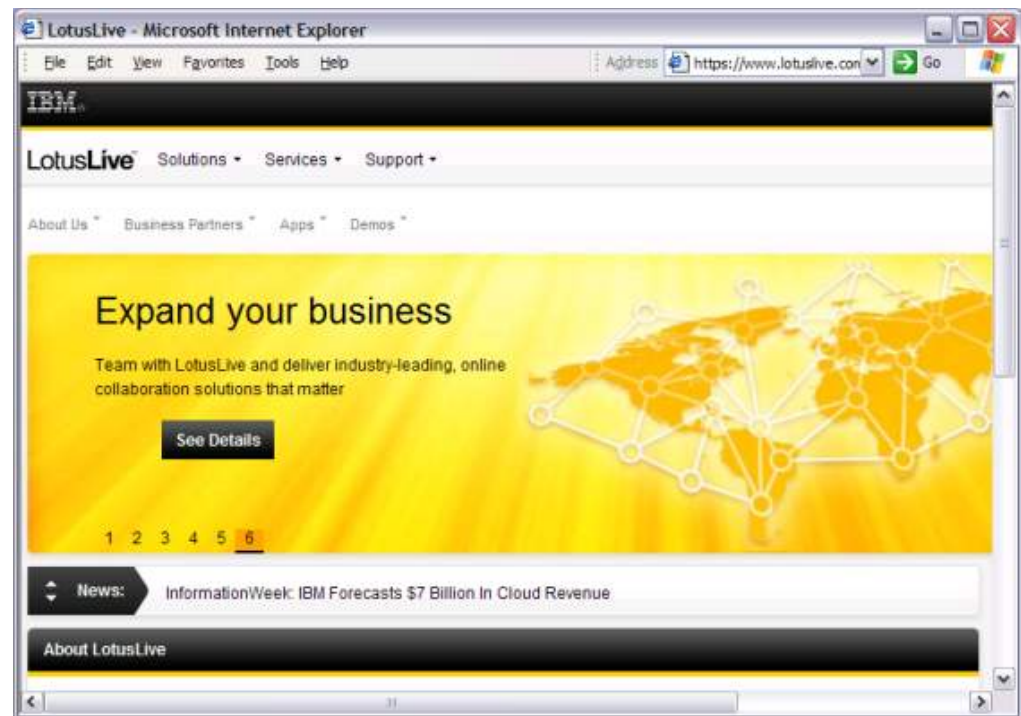
SWG Manager Community
SOPHIA TSENG | Jul 28
[Feeds](#) | [Bookmarks](#) | [Forums](#)

Imperative #1: Foster lasting connections

Best Practice #1B: Increase business collaboration

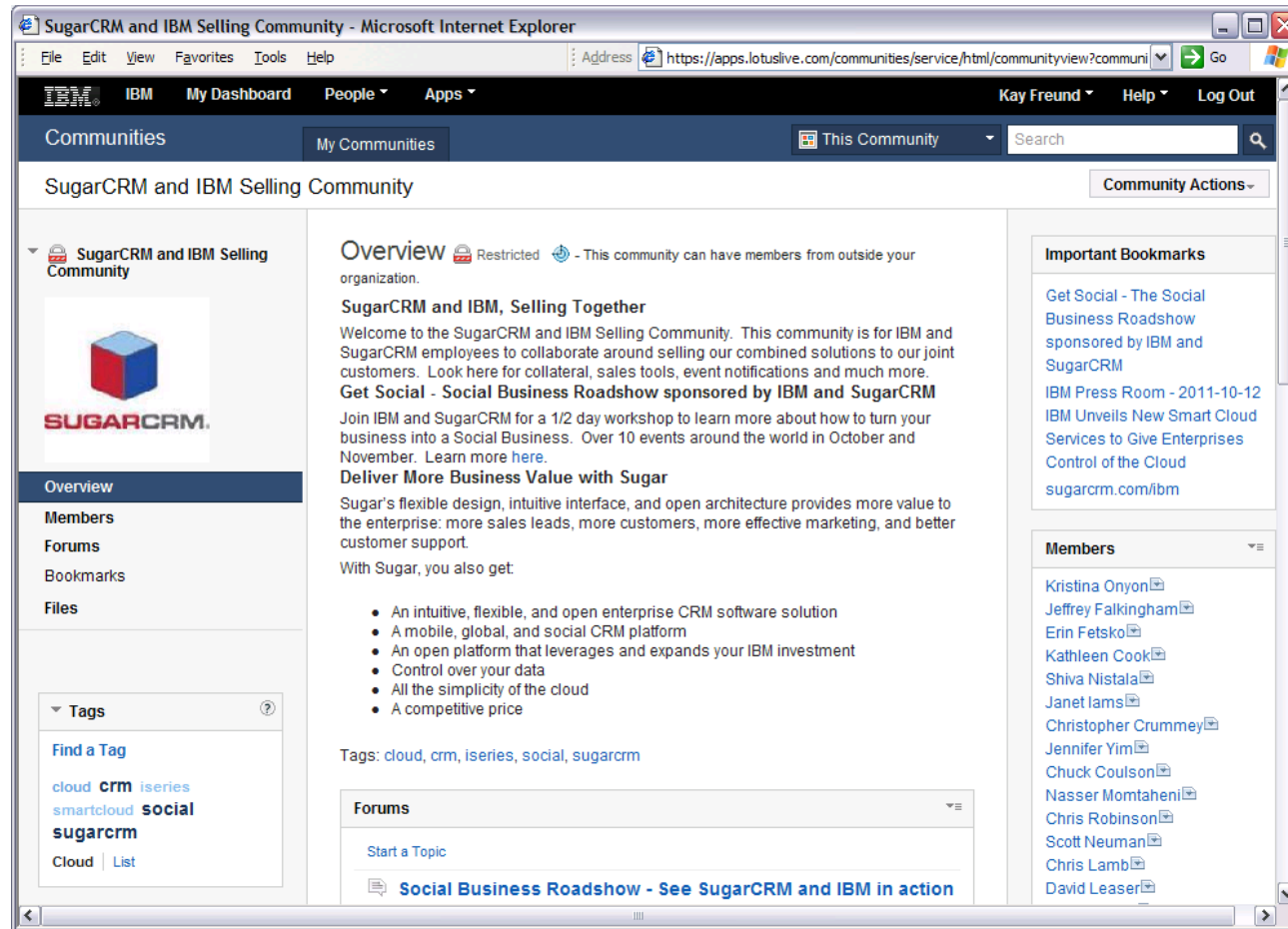
Example: Online collaboration within your business and beyond

- 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
- "2nd Trust Source"

Experience



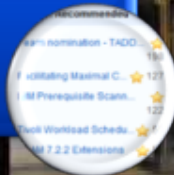
- Crowdsourcing
- Internal & External
- Prioritize features
- 3-4 months faster to market
- Technology Adoption Program

Innovation



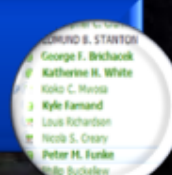
- Digital Reputation
- SME & Natural Champions
- 22K Blogs
- 179% adoption

Digital Reputation



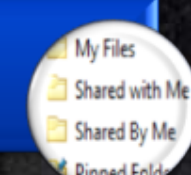
- Real Time Collaboration
- 50M IMs per day
- 2x every 3 years

Real Time



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

Wisdom of Crowds

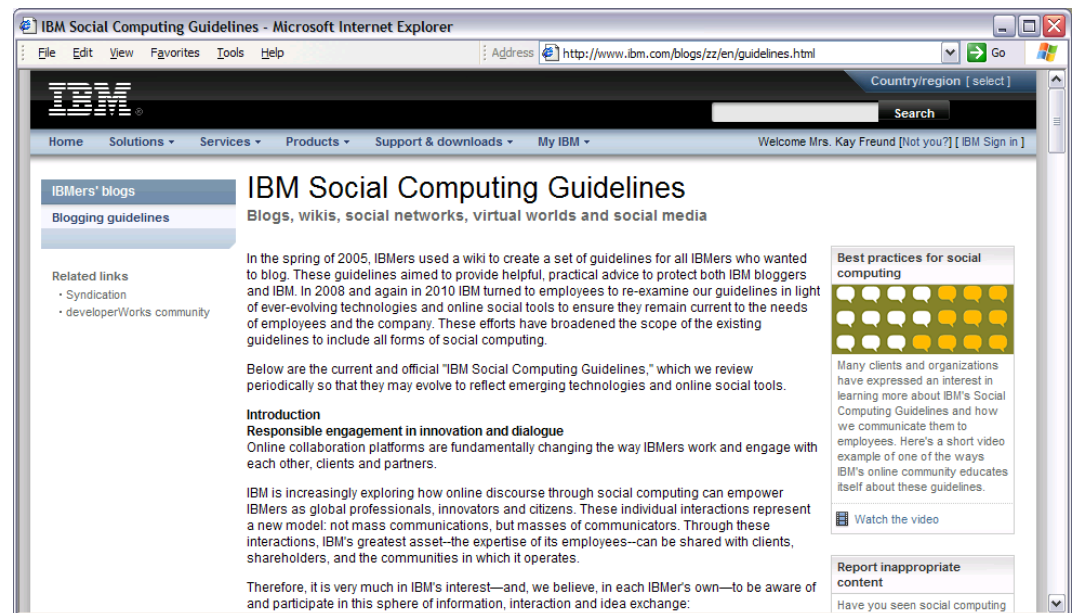


Imperative #2: Deliver value to empowered customers

Best Practice #2A: Be social within guidelines

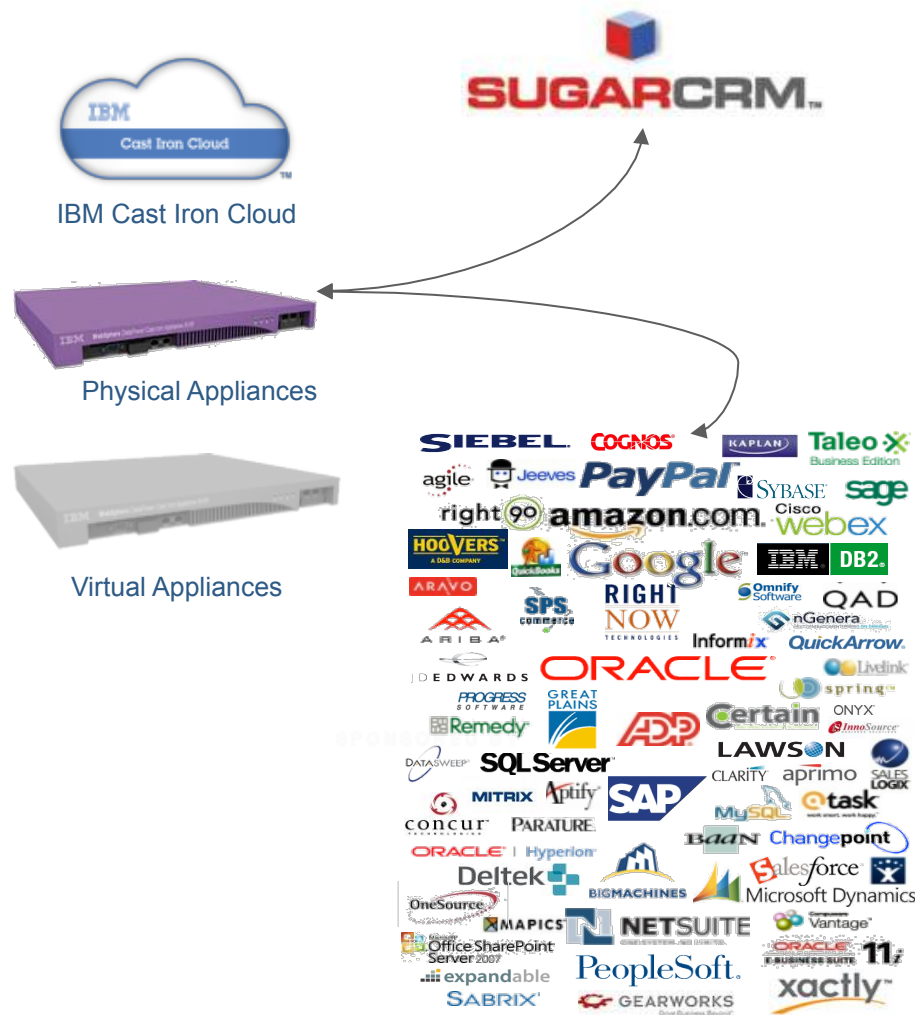
Example: IBM Social Computing Guidelines

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



Imperative #2: Deliver value to empowered customers

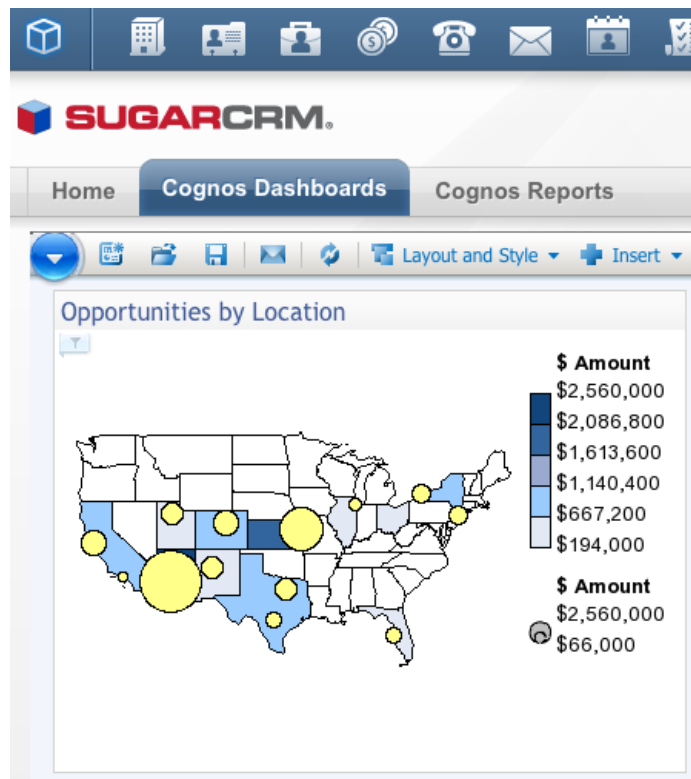
Best Practice #2B: Give customers what they want



- 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
 - www.sugarcrm.com/ibm
 - Follow #IBMSocialBiz
 - Like facebook.com/MidmarketIBM



Agenda



#IBMSocialBiz #sugarcrm

- Keynote: Brian Vellmure

- Customer Testimonial

----- Coffee break -----

- The New Rules and Best Practices of Social CRM (*Sugar*)

- From Social Media to Social CRM: Best Practices for Becoming a Social Business (*IBM*)

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- A Day in the Life of the Social Business

- Question and Answer Session





#IBMSocialBiz #sugarcrm

A Day in the Life of a Social Business

Cheri Stockton

Technical Product Marketing Manager

SugarCRM



SOCIAL CRM

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

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SUGARCRM.



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

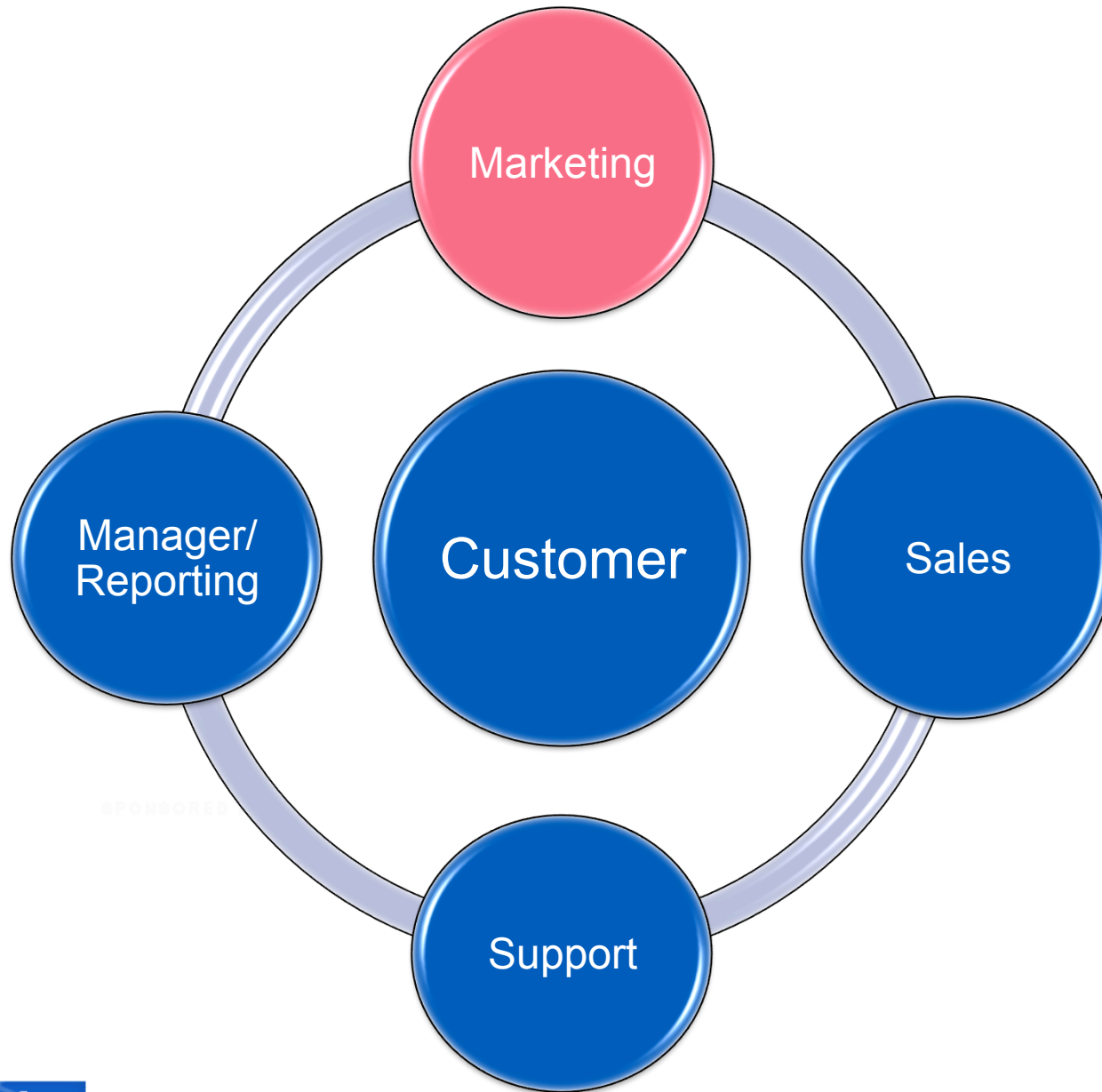
You will see Social CRM in Action:

- **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



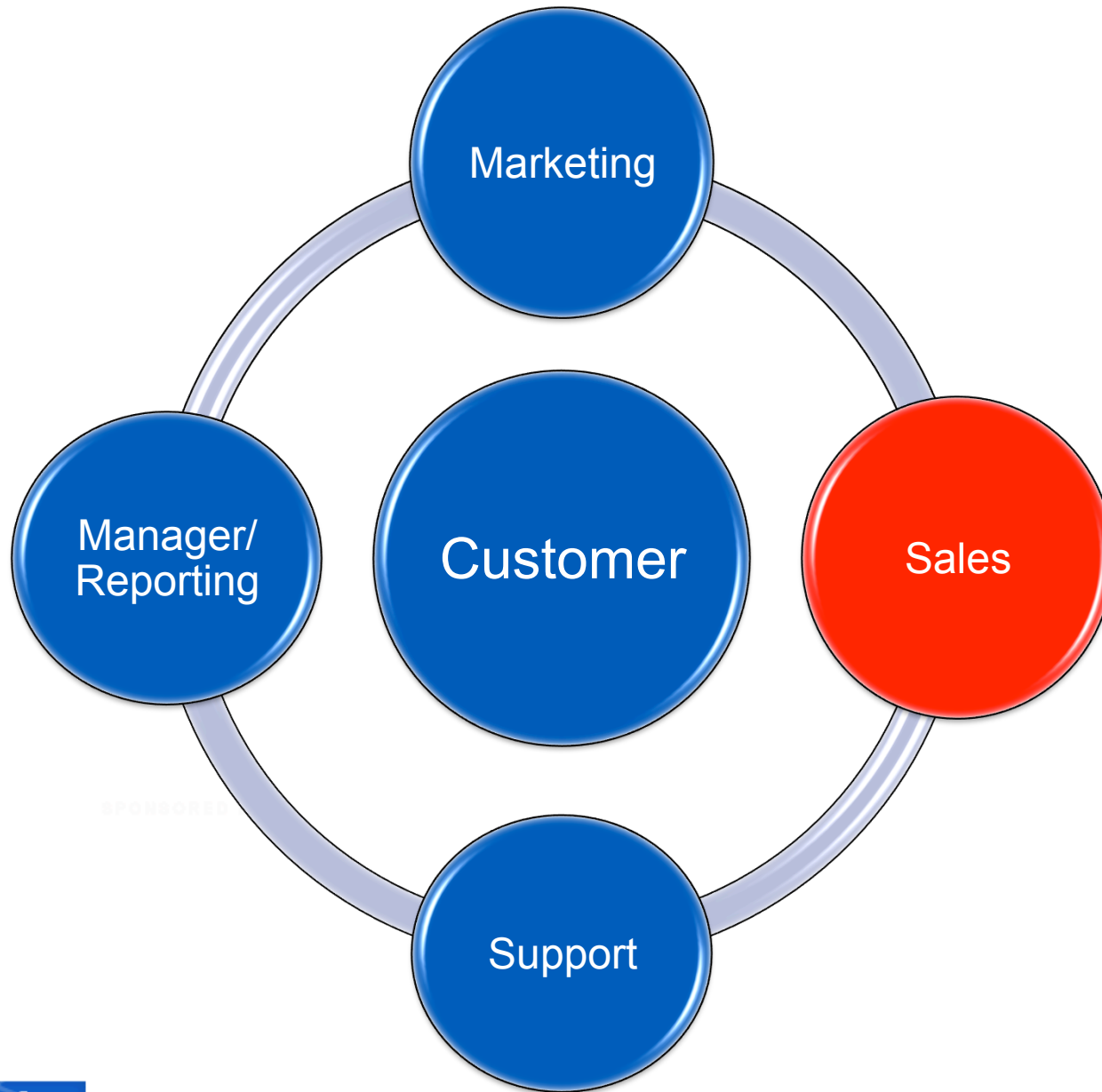
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A Prospect Responds



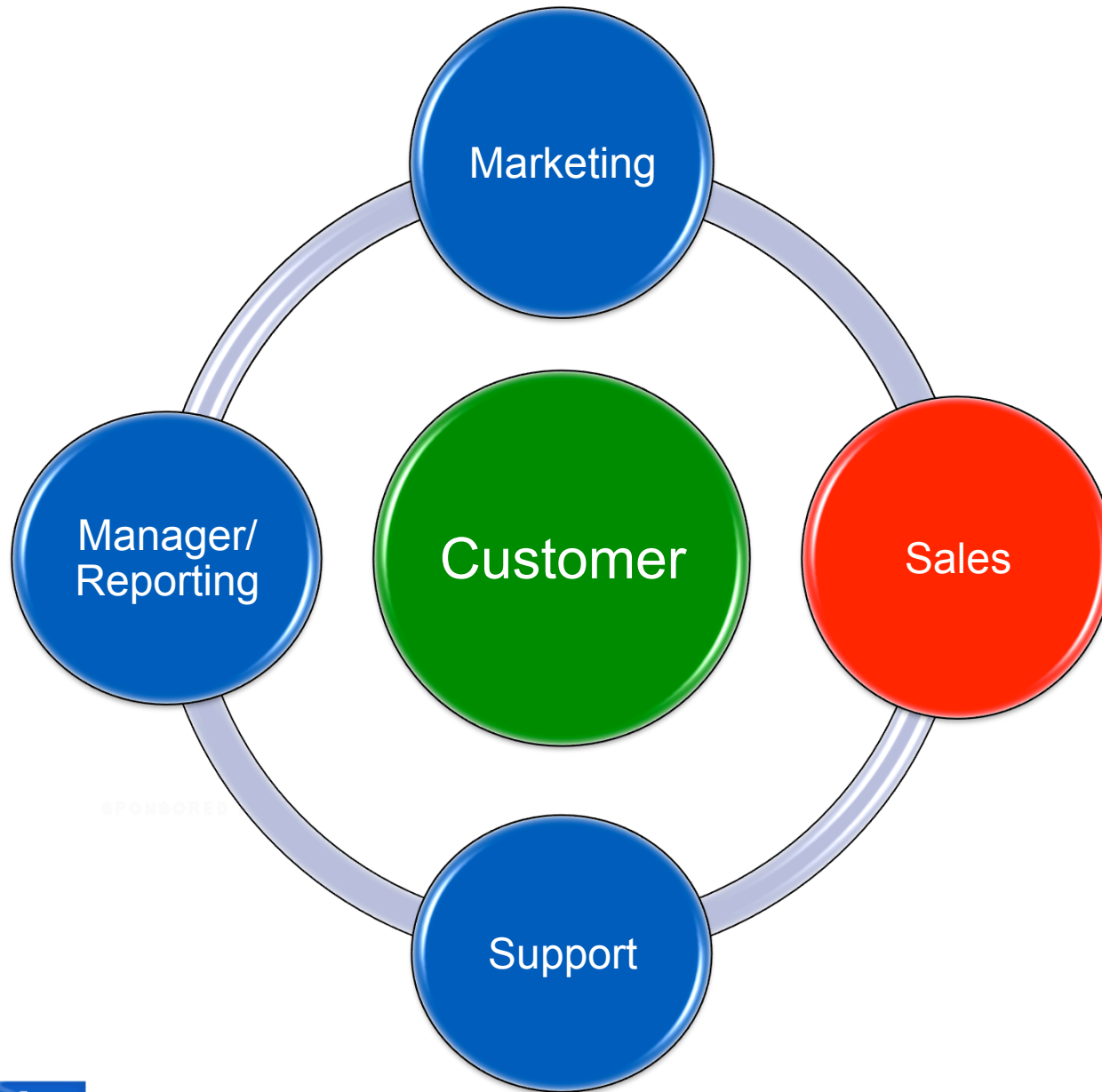
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Sales Works the Lead



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Sales and the Prospect Interact Socially



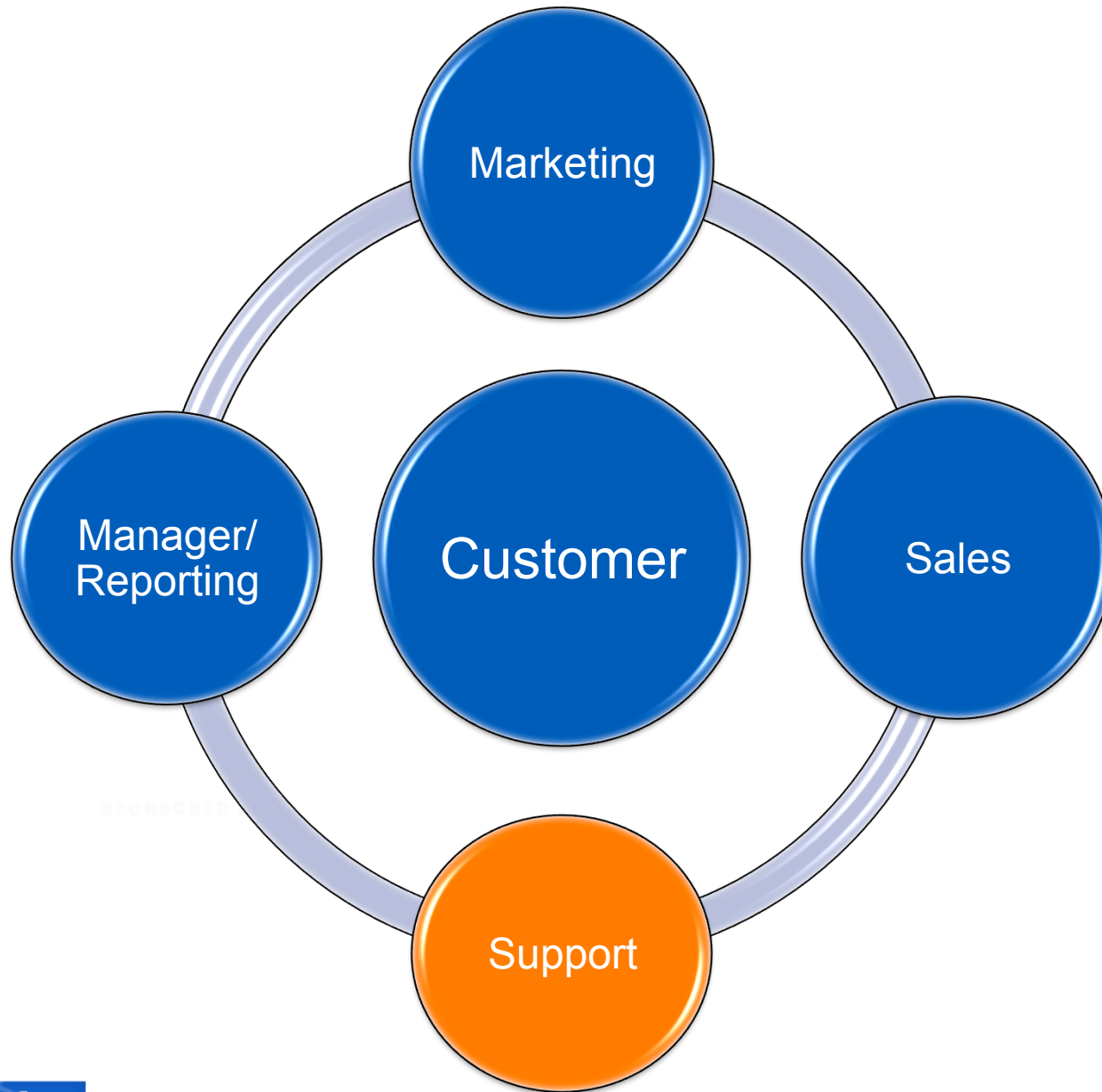
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Management Views the Forecast



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Warm Handoff to Customer Support

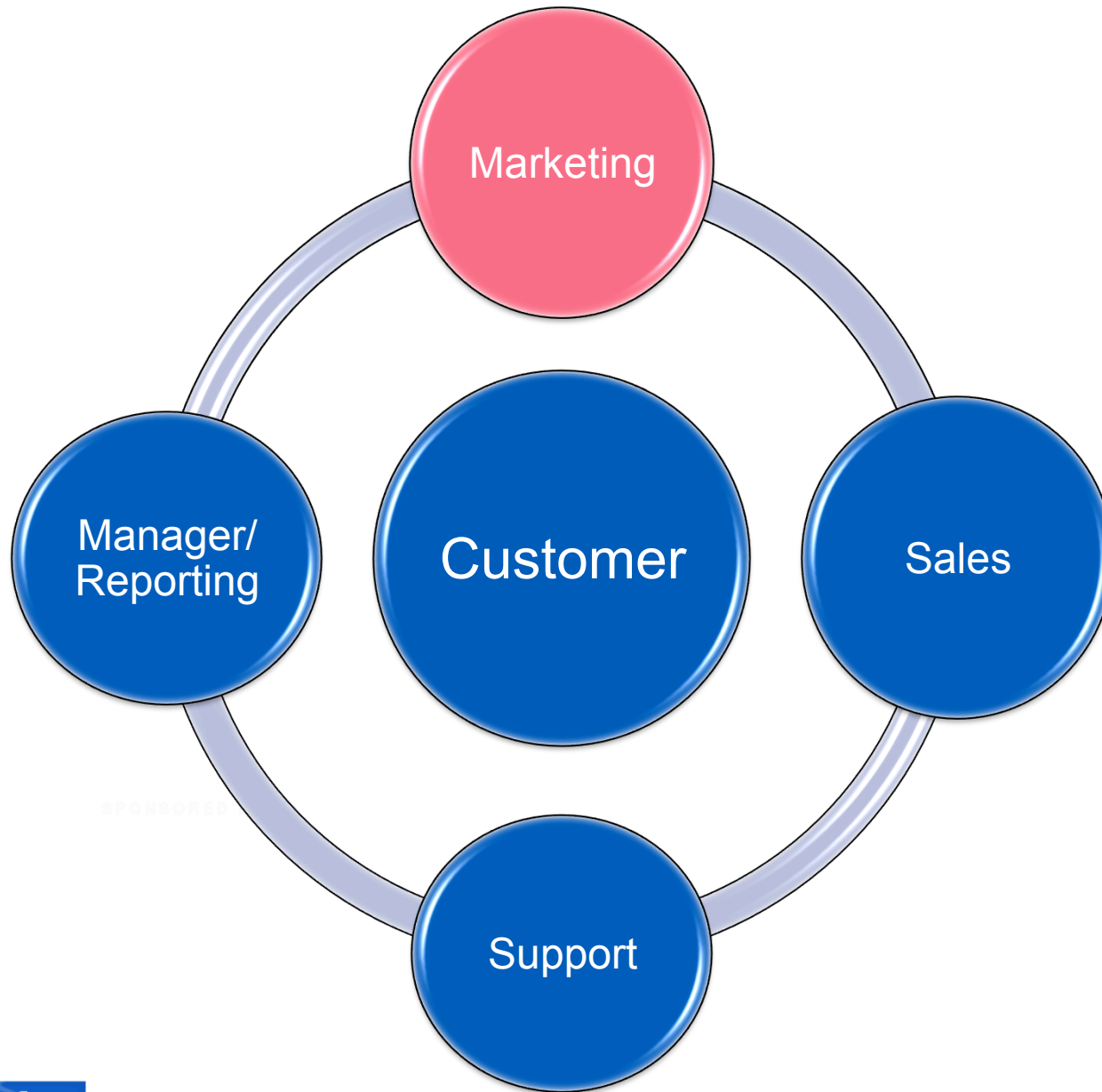


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The Customer Opens a Support Ticket



Marketing Reviews the Campaign's ROI



The Social Business

SugarCRM


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

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- » 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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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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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

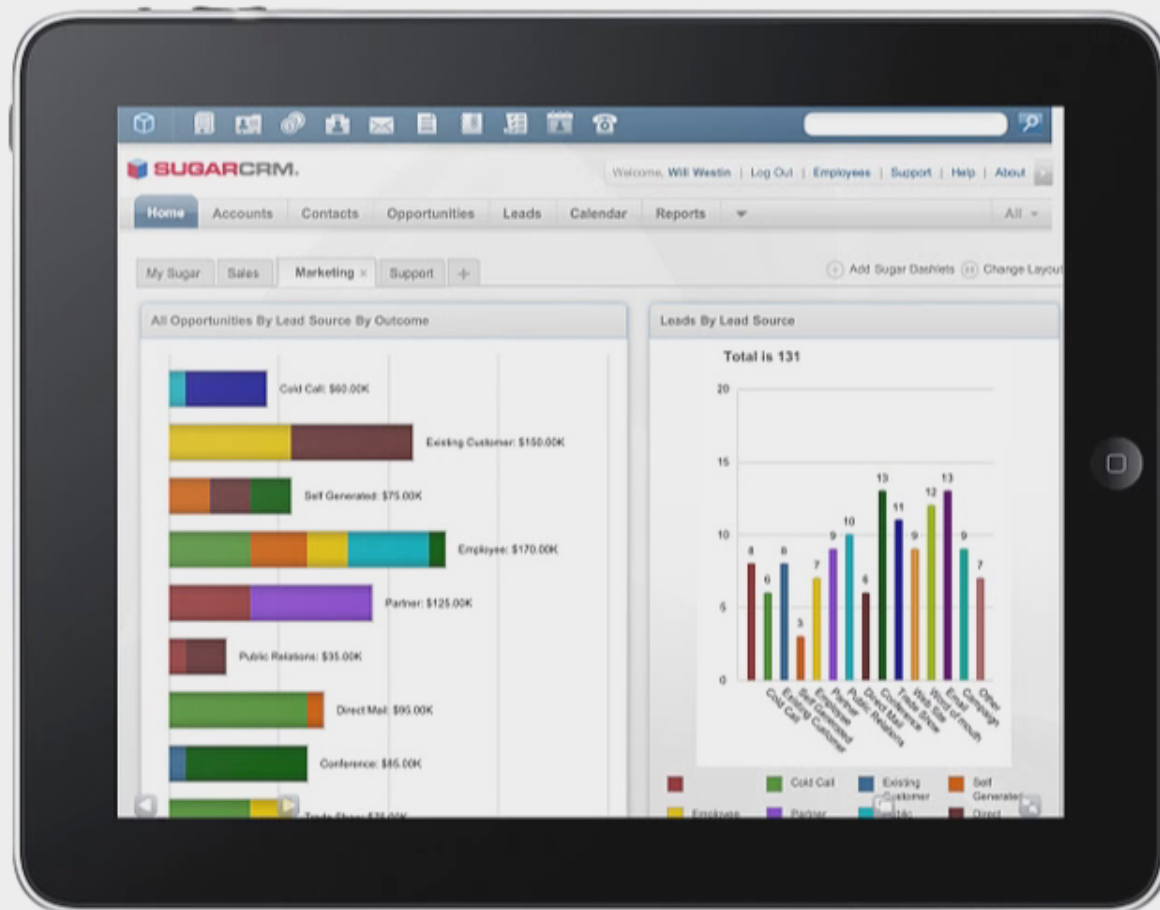
Mobile and Social

- 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 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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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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SUGARCRM.





» **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**

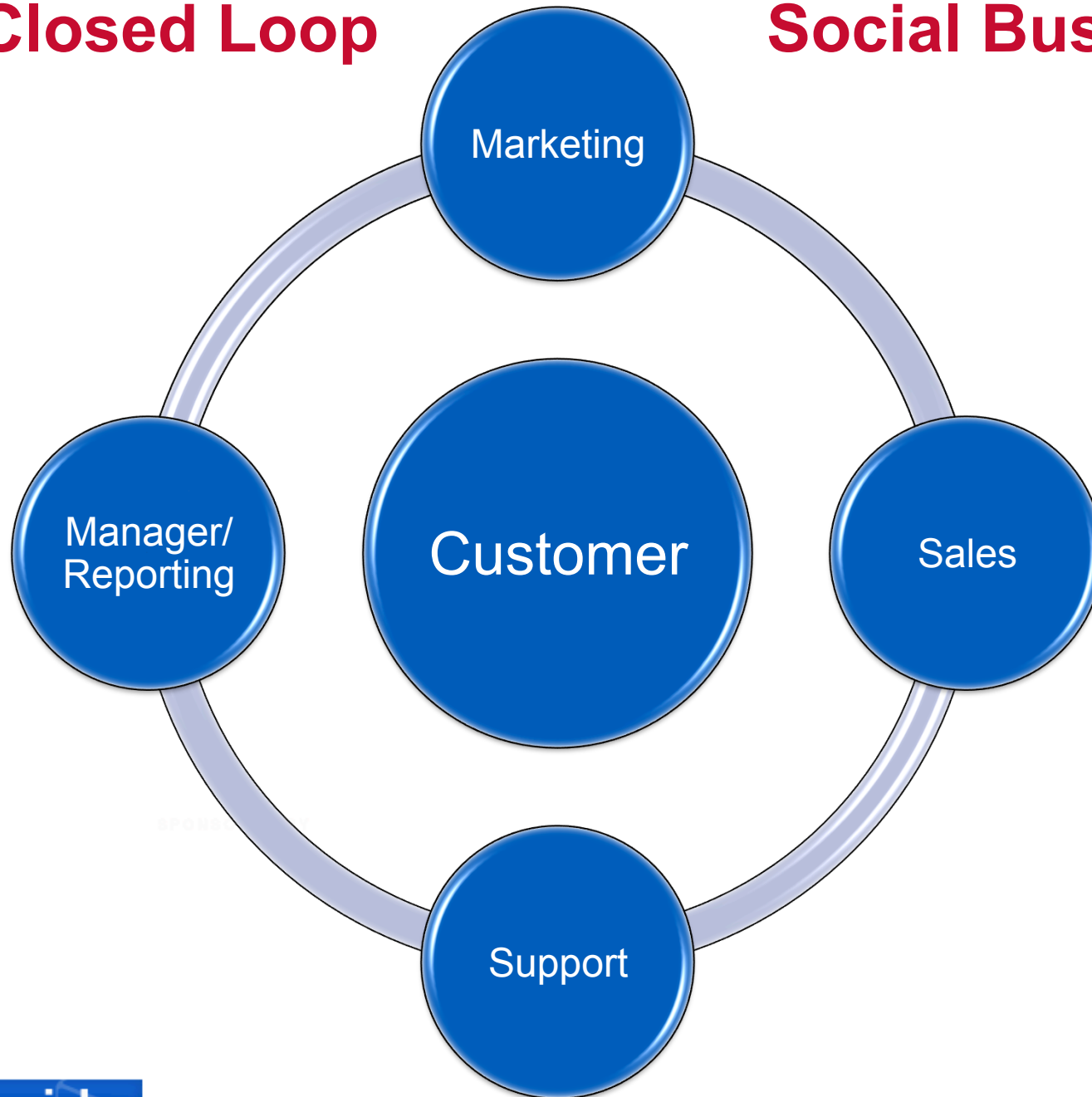
Create Select		(1 - 3 of 3)	
Target List ▾	Description	Type ▾	Targets in List
Mobile Campaign New Lead List		Default	414 edit rem
Mobile CRM Lead Nurturing List		Default	159 edit rem
Opt-outs		Suppression List - By Id	7 edit rem

▲ **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
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- **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



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@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

www.sugarcrm.com/ibm

Agenda



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- Question and Answer Session



Questions and Answers

