



#IBMSocialBiz #sugarcrm

Get Social

The Social Business Roadshow

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SUGARCRM



Hosted By:



INTRICITY
simplifying complexity



One Site. Everything IT.

itWorldCanada.com

IDG CANADA

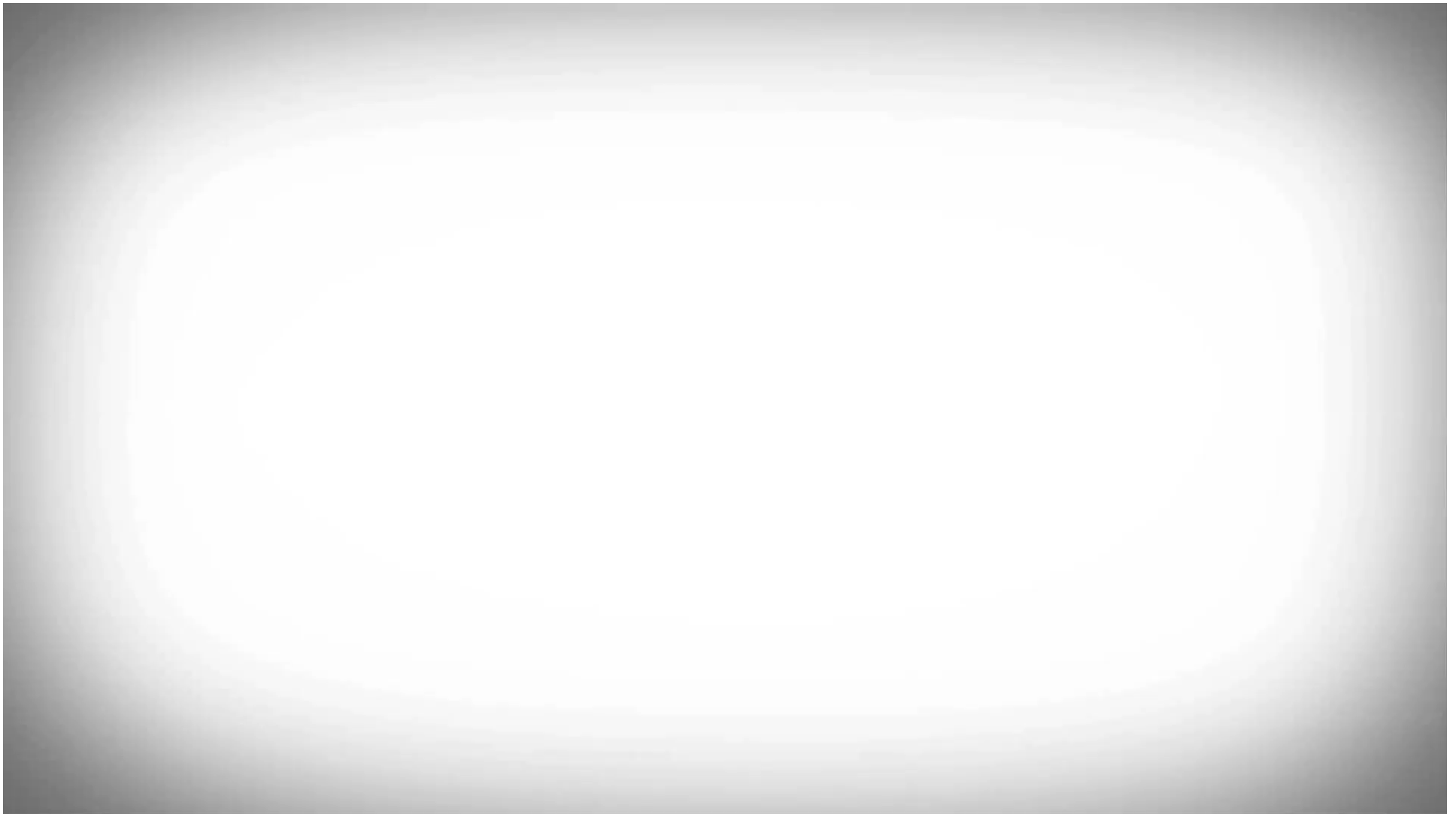
Welcome and Intro Video

Jan Sysmans

Senior Director Product Marketing

SugarCRM





Introductions

Jan Sysmans

Senior Director Product Marketing

SugarCRM



Our Speakers Today

- Jim Love



@therealjimlove



#IBMSocialBiz #sugarcrm

Agenda



#IBMSocialBiz #sugarcrm

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

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Overview



#IBMSocialBiz #sugarcrm

- Customer Testimonials
- The New Rules of Social CRM (*Sugar*)
- From Social Media to Social CRM (*IBM*)
---- Coffee break -----
- How Do You Integrate Social Media (*Sugar*)
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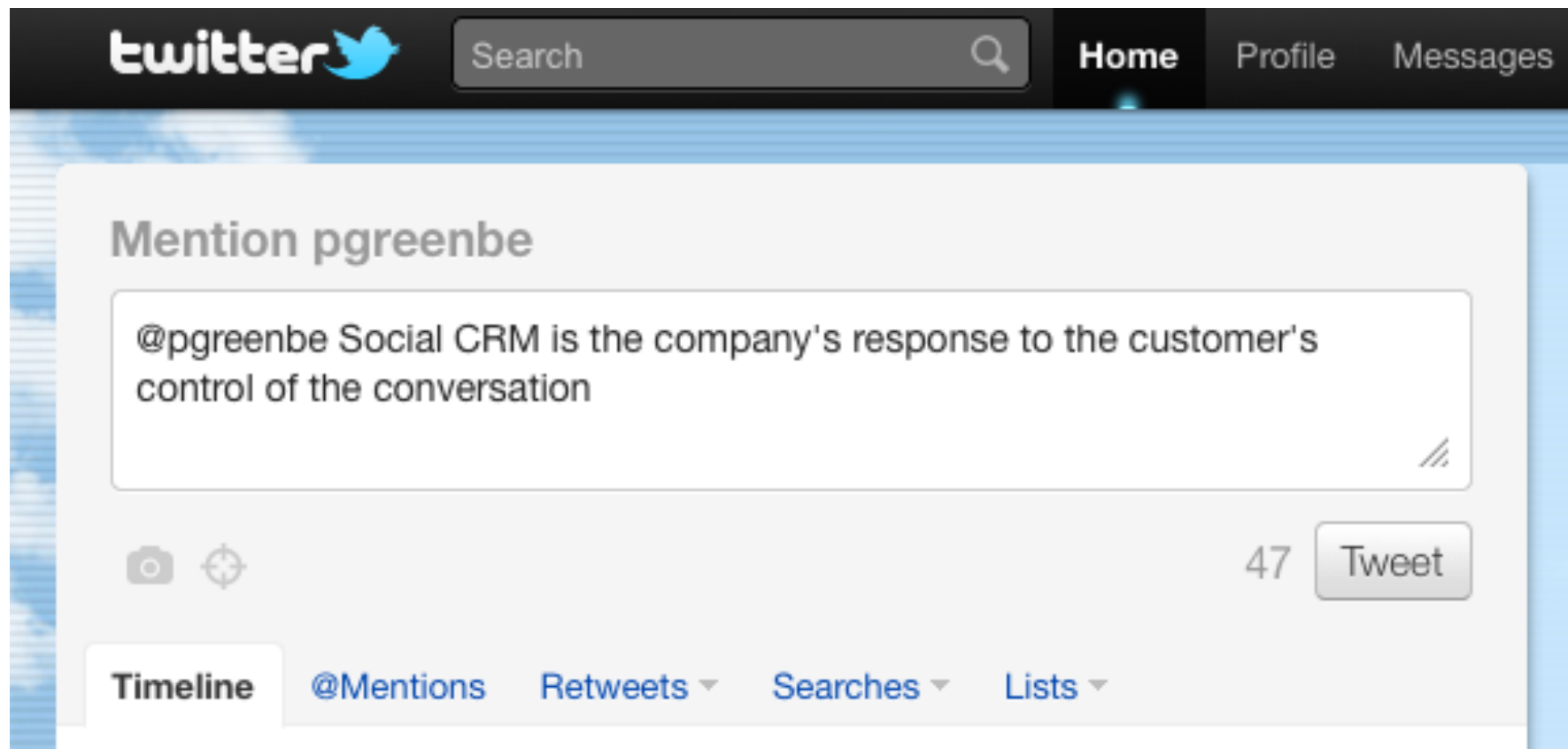
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SUGARCRM.



Social CRM Is...



Get Social

The Social Business Roadshow

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Cleaning The Social Litter Box with Sugar 6

**Adrian Boerstra
Director Business Solutions
Intricity, LLC**



Agenda

- About Intricity, LLC
- Overview
- Selling Solutions
- Sales Leads + Customer Context
- Before
- The Problem
- The Solution
- The Result

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About Intricity, LLC

Intricity is a Business Solutions Provider specializing in CRM, and Information Management.

- 12 locations in Canada and the USA
- Gold level SugarCRM Partner
- IBM Partner

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SUGARCRM.



Selling Solutions with Intangible But High Value

- Know your prospects
- Understand their industry
- Research potential challenges
- Prepare good questions
- Be ready to discuss relevant experience
- Help your prospect envision a solution

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Sales Leads + Customer Context = Increased Sales



Lead Sources

- Website traffic
- Event registrations
- Whitepaper Downloads
- Inbound phone calls
- Opt-in Email Campaigns
- Partners



Sources of Customer Context

- Hoovers , Lead411
- Google/Google Finance
- Internal CRM - Past Transactions
- Social web - Facebook, LinkedIn, Twitter, etc
- News, Jobs Postings
- Company website

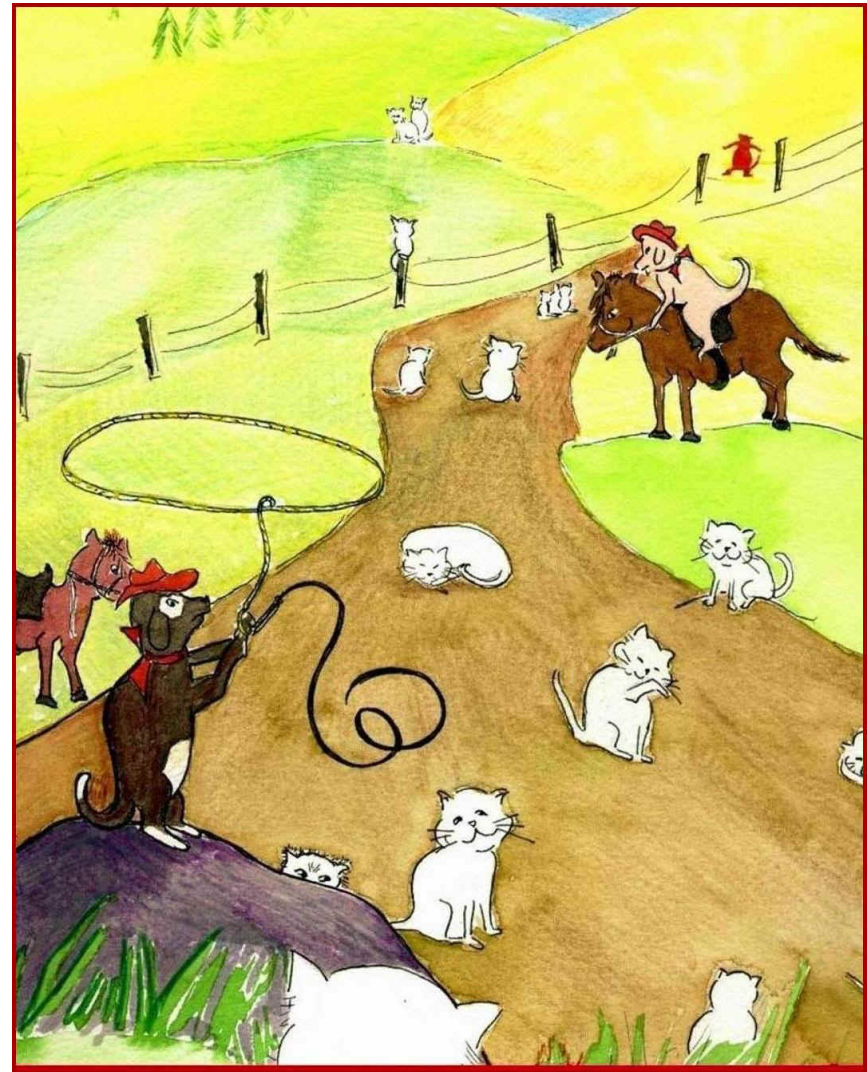
Preparing For The Phone Call...

- Our sales people were using various sources of information to prepare for calls.
- Callback preparation times varied by sales rep and their familiarity with the individual tools, but were often 15-20 minutes and often could run higher.



Too much info...too many sources??

- Trying to collect all available customer context from the social web can feel a lot like herding cats



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The Problem...

- Research is required to be **effective**
- The time required to research was making us **inefficient**.



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So we did our homework...



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The Answer... SugarCRM 6 with InsideView

The screenshot displays the SugarCRM 6 user interface. At the top, a navigation bar includes icons for Lead, Overview, Source, Address Information, and other modules. The main content area shows a contact profile for **Mr. Samuel Palmisano**, assigned to **Adrian Boerstra**. The profile includes fields for Name, First Name, Last Name, Company Name (IBM), Title (Chairman of the Board, President and Chief Executive Officer), Office Phone, Email Address, and a detailed Description of his role and achievements at IBM. Below the profile, the **InsideView** section provides additional company information for **International Business Machines Corp.**, including ownership, industry, revenue, and employee count. It also features a **Smart Agent Results** section with a list of recent news items and a **Connections** section showing LinkedIn connections.

Assigned to: Adrian Boerstra

Teams: Adrian Boerstra

Name: Mr. Samuel Palmisano

First Name: Samuel

Last Name: Palmisano

Company Name: IBM

Title: Chairman of the Board, President and Chief Executive Officer

Office Phone: (914) 499-1900

Email Address: sam@us.ibm.com (Primary)

Website: www.ibm.com

Description: Sam Palmisano is Chairman of the Board, President and Chief Executive Officer of IBM. Mr. Palmisano was appointed to Chief Executive Officer in 2002 and Chairman in 2003. He began his career with IBM in 1973 in Baltimore, Maryland. Since then, Mr. Palmisano has held a series of leadership positions during his IBM career, including senior vice president for the Enterprise Systems and Personal Systems groups. Mr. Palmisano also played a key role in creating and leading IBM's Global Services, rising to senior vice president, and building the largest and most diversified information technology services organization in the industry. He also served as senior managing director of operations for IBM Japan. He became president and chief operating officer in 2000. Mr. Palmisano is a graduate of The Johns Hopkins University. In recognition of his leadership role as co-chair of the Council on Competitiveness' National Innovation Initiative, as well as his many business accomplishments, Mr. Palmisano was awarded an Honorary Degree of Doctor of Humane Letters from Rensselaer Polytechnic Institute in 2005. In 2006, he was awarded an Honorary Fellowship from the London Business School. He has received a number of business awards including the Atlantic Council's Distinguished Business Leadership Award in 2009 and the inaugural Deming Cup, presented in 2010 by the W. Edwards Deming Center for Quality, Productivity and Competitiveness at Columbia

InsideView

International Business Machines Corp. | Not the right company?

View Watchlist | Build a List | Settings | Help

Overview | People | Buzz | Family Tree | Competitors | More

Ownership: Public Company (NYSE:IBM)

Industry: IT Services & Consulting | More

Revenue(ttm): \$106,448.0M | More | Financial Details

Employees: 426,751

Description: International Business Machines Corporation (IBM) is an information... | More

One New Orchard Road
Armonk, NY 10504
United States
www.ibm.com | More
Phone: 1-914-499-1900

Smart Agent Results for last 30 days

83 Leadership Chan... | StorSimple Appoints Enterprise Storage Sales Veteran to Support Company's Continuing Market Growth (BIZ) | AlphaTrade Finance - Oct 31, 06:10 PDT | Share

116 New Offerings | New Age Of Transparency: Corporate Disclosure of Political Spending Is Now the Norm as Companies Restrict Campaign... | Buildlog Reporter - Oct 31, 03:13 PDT | Share

89 Acquisitions | CEA Names 2012 Executive Board and Board of Industry Leaders | TMC Net - Oct 31, 02:35 PDT | Share

98 Partnerships | IBM Returns, Amidst CEO Succession Plan

57 Expanding Opera...

34 Cost Cutting

26 Out-of-office

Connections | Settings

0 connections at International Busine...

LinkedIn Connections

You have 18 connections

Source(s): | Wrong info?

Look up and sync details for your contact, including phone, email, address, etc

The screenshot displays the InsideView CRM interface. At the top, a navigation bar contains various icons for different functions. Below this, a contact profile for Samuel Palmisano is shown. The profile includes fields for First Name, Last Name, Company Name, Title, Office Phone, Email Address, and Website. A detailed description of his role and career is provided. Below the profile, there are tabs for Overview, People, Buzz, Family Tree, Competitors, and More. A search bar labeled 'Find Contact:' is present. On the right, there are links for 'View Watchlist', 'Build a List', 'Settings', and 'Help'. A 'Track it!' button is also visible. The bottom of the interface shows the 'InsideView TEAM' logo and a list of source applications.

First Name:	Samuel	Last Name:	Palmisano
Company Name:	IBM	status:	New
Title:	Chairman of the Board, President and Chief Executive Officer	Twitter:	http://twitter.com/#!/SamuelPalmisano
Office Phone:	(914) 499-1900	Mobile:	
Email Address:	sam@us.ibm.com (Primary)	Website:	www.ibm.com

Description: Sam Palmisano is Chairman of the Board, President and Chief Executive Officer of IBM. Mr. Palmisano was appointed to Chief Executive Officer in 2002 and Chairman in 2003. He began his career with IBM in 1973 in Baltimore, Maryland. Since then, Mr. Palmisano has held a series of leadership positions during his IBM career, including senior vice president for the Enterprise Systems and Personal Systems groups. Mr. Palmisano also played a key role in creating and leading IBM's Global Services, rising to senior vice president, and building the largest and most diversified information technology services organization in the industry. He also served as senior managing director of operations for IBM Japan. He became president and chief operating officer in 2000. Mr. Palmisano is a graduate of The Johns Hopkins University. In recognition of his leadership role as co-chair of the Council on Competitiveness' National Innovation Initiative, as well as his many business accomplishments, Mr. Palmisano was awarded an Honorary Degree of Doctor of Humane Letters from Rensselaer Polytechnic Institute in 2005. In 2006, he was awarded an Honorary Fellowship from the London Business School. He has received a number of business awards including the Atlantic Council's Distinguished Business Leadership Award in 2009 and the inaugural Deming Cup, presented in 2010 by the W. Edwards Deming Center for Quality, Productivity and Competitiveness at Columbia

InsideView™

International Business Machines Corp. | Not the right company?

View Watchlist | Build a List | Settings | Help

Overview People Buzz Family Tree Competitors More

Find Contact: Search for name or title

Find more Contacts on LinkedIn

expand/collapse all

- 1 Chief Executive Officer
 - Samuel J. Palmisano | Sync
 - Chairman of the Board, President and Chief Executive Officer
- 19 President(s)
- 65 CxO(s)
- 79 GM/Managing Director(s)
- 4 Executive Vice President(s)
- 31 Senior Vice President(s)
- 464 Vice President(s)

Connections Settings

0 connections at International Busine...

LinkedIn Connections

InsideView TEAM

Source(s):

Yes.... It integrates with Twitter, and LinkedIn

The screenshot displays the SugarCRM interface for a lead named Mr. Samuel Palmisano. The lead overview shows contact information, company (IBM), and a description. Two social media integration overlays are visible: one for IBM showing recent tweets and a 'Join the conversation' button, and another for LinkedIn and Twitter showing connection options. Below the lead profile, the 'InsideView' section provides a detailed overview of International Business Machines Corp., including ownership, industry, revenue, and employee count. It also features 'Smart Agent Results' for the last 30 days, listing various business events and campaigns.

Lead Overview:

- Assigned to: Adrian Boerstra
- Name: Mr. Samuel Palmisano
- First Name: Samuel
- Company Name: IBM
- Title: Chairman of the Board, President
- Office Phone: (914) 499-1900
- Email Address: sam@us.ibm.com (Primary)
- Description: Sam Palmisano is Chairman of IBM. Since then, Mr. Palmisano has been creating and leading IBM's Global Business Process Center for IBM Japan. He became president of IBM Japan, as well as his many roles from the London Business School and Deming Center for Quality, Productivity and Innovation.

Social Media Integration:

- IBM:** Recent tweets about social business, IBM research updates, and a write-up about the new @IBM Research lab in Dublin.
- LinkedIn:** Connection options for Samuel Palmisano.
- Twitter:** Connection options for Samuel Palmisano.

InsideView - International Business Machines Corp.

- Ownership: Public Company (NYSE: IBM)
- Industry: IT Services & Consulting
- Revenue(ttm): \$106,448.0M
- Employees: 426,751
- Description: International Business Machines Corporation (IBM) is an information technology company.

Smart Agent Results for last 30 days:

- 83 Leadership Changes
- 116 New Offerings
- 89 Acquisitions
- 98 Partnerships

More twitter stuff... Blogs... website traffic...

Contact Profile: Samuel Palmisano

First Name: Samuel	Last Name: Palmisano
Company Name: IBM	Status: New
Title: Chairman of the Board, President and Chief Executive Officer	Twitter: http://twitter.com/#!/SamuelPalmisano
Office Phone: (914) 499-1900	Mobile:
Email Address: sam@us.ibm.com (Primary)	Website: www.ibm.com

Description: Sam Palmisano is Chairman of the Board, President and Chief Executive Officer of IBM. Mr. Palmisano was appointed to Chief Executive Officer in 2002 and Chairman in 2003. He began his career with IBM in 1973 in Baltimore, Maryland. Since then, Mr. Palmisano has held a series of leadership positions during his IBM career, including senior vice president for the Enterprise Systems and Personal Systems groups. Mr. Palmisano also played a key role in creating and leading IBM's Global Services, rising to senior vice president, and building the largest and most diversified information technology services organization in the industry. He also served as senior managing director of operations for IBM Japan. He became president and chief operating officer in 2000. Mr. Palmisano is a graduate of The Johns Hopkins University. In recognition of his leadership role as co-chair of the Council on Competitiveness' National Innovation Initiative, as well as his many business accomplishments, Mr. Palmisano was awarded an Honorary Degree of Doctor of Humane Letters from Rensselaer Polytechnic Institute in 2005. In 2006, he was awarded an Honorary Fellowship from the London Business School. He has received a number of business awards including the Atlantic Council's Distinguished Business Leadership Award in 2009 and the inaugural Deming Cup, presented in 2010 by the W. Edwards Deming Center for Quality, Productivity and Competitiveness at Columbia.

InsideView™ International Business Machines Corp. | Not the right company?

View Watchlist | Build a List | Settings | Help

Overview | People | **Buzz** | Family Tree | Competitors | More

Find:

Twitter | More Tweets

IBM Releases Native iPad App for its Social Software Platform: IBM rounds up mobile offerings for it... <http://t.co/bJK1prMG> #technorati
Oct 31 2011, 18:30 PDT | [TRBlogging \(Technorati Blogging\)](#)

IBM Releases Native iPad App for its Social Software Platform: IBM rounds up mobile offerings for its industry-L... <http://t.co/4v74cNji>
Oct 31 2011, 18:30 PDT | [SocialMatica \(socialmatica\)](#)

RT @infoworld: Up to 200K IBM workers will be allowed to bring their own mobile devices for work: <http://t.co/TQGHrmwt>
Oct 31 2011, 18:30 PDT | [bornmw \(Oleg Mikhaylov\)](#)

Blogs | More Blogs

The FTTechhub from the Financial Times writes about the web, Silicon Valley, innovation and social media.
[Quanta takes on HP and IBM in servers](#) | [FT Tech Hub](#) | [FTTechhub ...](#)
Mon, 31 Oct 2011 08:10:00 PDT | [Robin Kwong](#)

Unique Visitors **compete**

Line graph showing Unique Visitors for ibm.com from Sep 10 to Sep 11. The y-axis ranges from 0M to 1.5M. The line shows a fluctuating trend, generally staying between 1M and 1.2M.

InsideView TEAM

All | Support | Other

Activities

Link to other subsidiaries

The screenshot displays the InsideView website interface. At the top, there is a navigation bar with various icons. Below this, a large text box contains a detailed biography of Sam Palmisano, including his roles at IBM and his educational background. The main content area features the 'International Business Machines Corp.' profile, which includes tabs for Overview, People, Buzz, Family Tree, Competitors, and More. The 'Family Tree' tab is currently selected, showing a list of subsidiaries under the heading 'International Business Machines Corp. (current company)'. These subsidiaries include Armonk, United States; Adaytum, Inc.; Minneapolis, United States; AlphaBlox Corporation, Inc.; Mountain View, United States; Applix (UK) Ltd.; London, United Kingdom; Applix B.V.; Hertogenbosch, Netherlands; Applix GmbH; Munich, Germany; BigFix, Inc.; Emeryville, United States; Blade Network Technologies, Inc.; and Santa Clara, United States. To the right of this list, there is a section titled 'Acquisitions by International Business Machines Corp.' which lists several acquired companies: Access360, Aptrix, AptSoft Corporation, Aragon Consulting Group Inc., Arsenal Digital Solutions USA, Inc., BuildForge Inc., Candle Corporation, Catapult Inc., and CGI Information Systems.

Sam Palmisano is Chairman of the Board, President and Chief Executive Officer of IBM. Mr. Palmisano was appointed to Chief Executive Officer in 2002 and has been with IBM since 1983. He was born in Baltimore, Maryland. Since then, Mr. Palmisano has held numerous leadership positions during his IBM career, including senior vice president for the Enterprise Systems and Personal Systems groups. Mr. Palmisano also played a key role in creating and leading IBM's Global Services, rising to senior vice president, and building the largest and most diversified information technology services organization in the industry. He also served as senior managing director of operations for IBM Japan. He became president and chief operating officer in 2000. Mr. Palmisano is a graduate of The Johns Hopkins University. In recognition of his leadership role as co-chair of the Council on Competitiveness' National Innovation Initiative, as well as his many business accomplishments, Mr. Palmisano was awarded an Honorary Degree of Doctor of Humane Letters from Rensselaer Polytechnic Institute in 2005. In 2006, he was awarded an Honorary Fellowship from the London Business School. He has received a number of business awards including the Atlantic Council's Distinguished Business Leadership Award in 2009 and the inaugural Deming Cup, presented in 2010 by the W. Edwards Deming Center for Quality, Productivity and Competitiveness at Columbia.

InsideView™

International Business Machines Corp. | Not the right company?

View Watchlist | Build a List | Settings | Help

Overview | People | Buzz | **Family Tree** | Competitors | More

International Business Machines Corp. (current company)

Armonk, United States

- [Adaytum, Inc.](#)
- Minneapolis, United States
- [AlphaBlox Corporation, Inc.](#)
- Mountain View, United States
- [Applix \(UK\) Ltd.](#)
- London, United Kingdom
- [Applix B.V.](#)
- Hertogenbosch, Netherlands
- [Applix GmbH](#)
- Munich, Germany
- [BigFix, Inc.](#)
- Emeryville, United States
- [Blade Network Technologies, Inc.](#)
- Santa Clara, United States

Acquisitions by International Business Machines Corp.

- [Access360](#)
- [Aptrix](#)
- [AptSoft Corporation](#)
- [Aragon Consulting Group Inc.](#)
- [Arsenal Digital Solutions USA, Inc.](#)
- [BuildForge Inc.](#)
- [Candle Corporation](#)
- [Catapult Inc.](#)
- [CGI Information Systems](#)

InsideView TEAM

Competitive Info

Description: Mr. Palmisano is Chairman of the Board, President and Chief Executive Officer of IBM. Mr. Palmisano was appointed to Chief Executive Officer in 1992 and Chairman in 2000. He began his career with IBM in 1963 in Baltimore, Maryland. Since then, Mr. Palmisano has held numerous leadership positions during his IBM career, including senior vice president for the Enterprise Systems and Personal Systems groups. Mr. Palmisano also played a key role in creating and leading IBM's Global Services, rising to senior vice president, and building the largest and most diversified information technology services organization in the industry. He also served as senior managing director of operations for IBM Japan. He became president and chief operating officer in 2000. Mr. Palmisano is a graduate of The Johns Hopkins University. In recognition of his leadership role as co-chair of the Council on Competitiveness' National Innovation Initiative, as well as his many business accomplishments, Mr. Palmisano was awarded an Honorary Degree of Doctor of Humane Letters from Rensselaer Polytechnic Institute in 2005. In 2006, he was awarded an Honorary Fellowship from the London Business School. He has received a number of business awards including the Atlantic Council's Distinguished Business Leadership Award in 2009 and the inaugural Deming Cup, presented in 2010 by the W. Edwards Deming Center for Quality, Productivity and Competitiveness at Columbia.

InsideView™

International Business Machines Corp. | Not the right company?
 View Watchlist | Build a List | Settings | Help

Overview | People | Buzz | Family Tree | **Competitors** | More
 Track it!

Accenture Plc
 Public Company (NYSE:ACN)
 Track it!

Primary Industry:	Business Services	Revenue:	\$27,352.9M
		# of Employees:	236,000

Description: Accenture plc (Accenture) is a management consulting, technology services ([More](#))

CA, Inc.
 Public Company (NASDAQ:CA)
 Track it!

Primary Industry:	Computer Software	Revenue:	\$4,523.0M
		# of Employees:	13,400

Description: CA, Inc. (CA) is an independent enterprise information technology (IT) ([More](#))

Cisco Systems, Inc
 Public Company (NASDAQ:CSCO)
 Track it!

InsideView TEAM
 Source(s):

Financials, News, Job Postings, etc...

diversified information technology services organization in the industry. He also served as senior managing director of operations for IBM Japan. He became president and chief operating officer in 2000. Mr. Palmisano is a graduate of The Johns Hopkins University. In recognition of his leadership role as co-chair of the Council on Competitiveness' National Innovation Initiative, as well as his many business accomplishments, Mr. Palmisano was awarded an Honorary Degree of Doctor of Humane Letters from Rensselaer Polytechnic Institute in 2005. In 2006, he was awarded an Honorary Fellowship from the London Business School. He has received a number of business awards including the Atlantic Council's Distinguished Business Leadership Award in 2009 and the inaugural Deming Cup, presented in 2010 by the W. Edwards Deming Center for Quality, Productivity and Competitiveness at Columbia

InsideView™

International Business Machines Corp. | Not the right company?

[View Watchlist](#) | [Build a List](#) | [Settings](#) | [Help](#)

[Overview](#) | [People](#) | [Buzz](#) | [Family Tree](#) | [Competitors](#) | **Financials** | [More](#)

[Track it!](#)

Income Statement | All numbers in Millions of USD (except per share)

[Annual Data](#) | [Quarterly Data](#)

	12 Months ending 2010-12-31	12 Months ending 2009-12-31	12 Months ending 2008-12-31	12 Months ending 2007-12-31	12 Months ending 2006-12-31	12 Months ending 2005-12-31
Revenue	99,871	95,759	103,630	98,785	91,423	91,134
Other Revenue, Total	-1	-	-	1	-	-
Total Revenue	99,870	95,759	103,630	98,786	91,423	91,134
Cost of Revenue, Total	53,857	51,972	57,969	57,057	53,129	54,602
Gross Profit	46,014	43,787	45,661	41,728	38,294	36,532
Selling/General/Administrative Expenses, Total	20,943	20,193	23,386	22,060	20,259	21,314
Research & Development	6,026	5,820	6,337	6,153	6,107	5,842

InsideView TEAM

The result....

- We cancelled our subscriptions to Hoovers, Lead411, and DiscoverOrg.
- Reduced annual cost of Business Information subscriptions by over 95%
- Reduced average call prep time by 80%
- Increased call productivity 500%
- More consistent information for all reps
- One tool....

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Before SugarCRM 6



After SugarCRM 6





A Relationship Based Enterprise

Jim Love
CIO, IT World Canada
jlove@itworldcanada.com





One Site. Everything IT.
itWorldCanada.com
 IDG CANADA

itbusiness.ca
 Business Advantage through Technology

DIRECTION INFORMATIQUE



CDN



Canadian Online Publishing Awards - 2011

Best On-line Publication – ITBusiness.ca
Gold Award for Best Cross-Platform Initiative – CIO Canada
Gold Honours – CIO Canada (Cloud Computing Edition)
Silver Honours for Best News Coverage – IT World Canada



Community & Content



The
**CIO CANADA
DEBATE**



You Find **it**.
ca

SPONSORED BY

j  **bs.**
it World Canada

Get Social
The Social Business Roadshow

 **SUGARCRM.**

IBM

Canada's Largest and Most Successful Event Producer



CIO, Executive, IT and Government Events, plus custom events
Targeted CIO Breakfasts, IT Conferences, and Government Retreats
Connect with Canada's most influential community of IT Decision-Makers





Is it time for a fresh look at your agency?



Continual Transformation

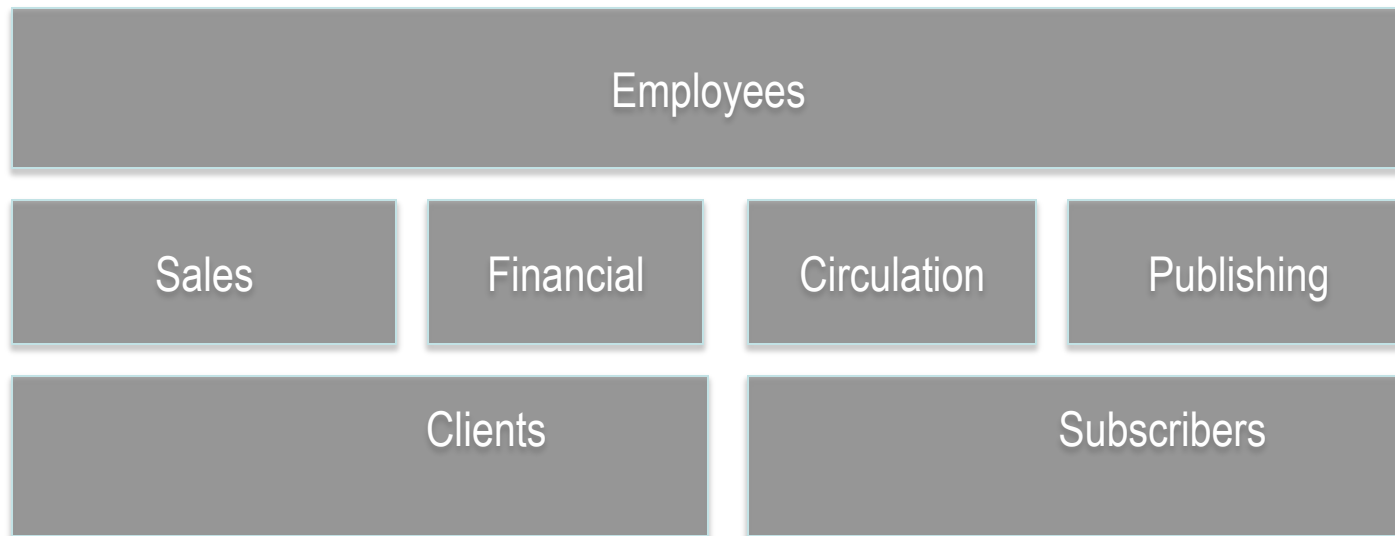
- Create *and* Curate – the new 3 Rs
- Semantic search and recommendation engines
- New audiences and audience segmentation – hyper local, micro-segments
- SEO Experts watch our position and craft strategies to keep us at the top of search positions
- Social and mobile development and delivery become even more critical

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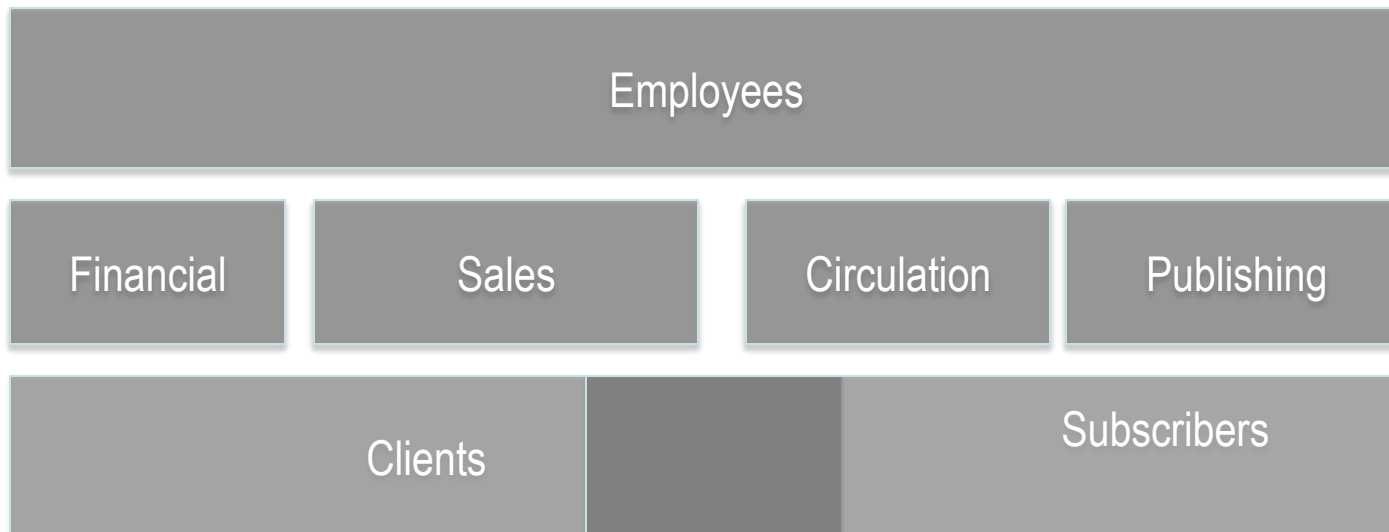


SUGARCRM.



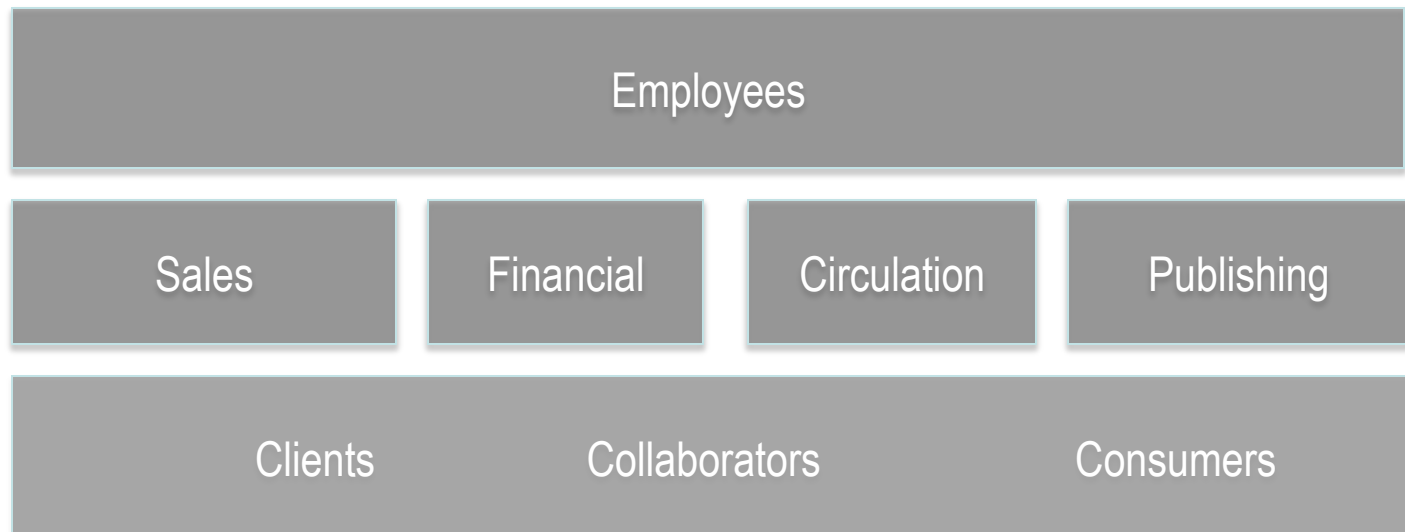


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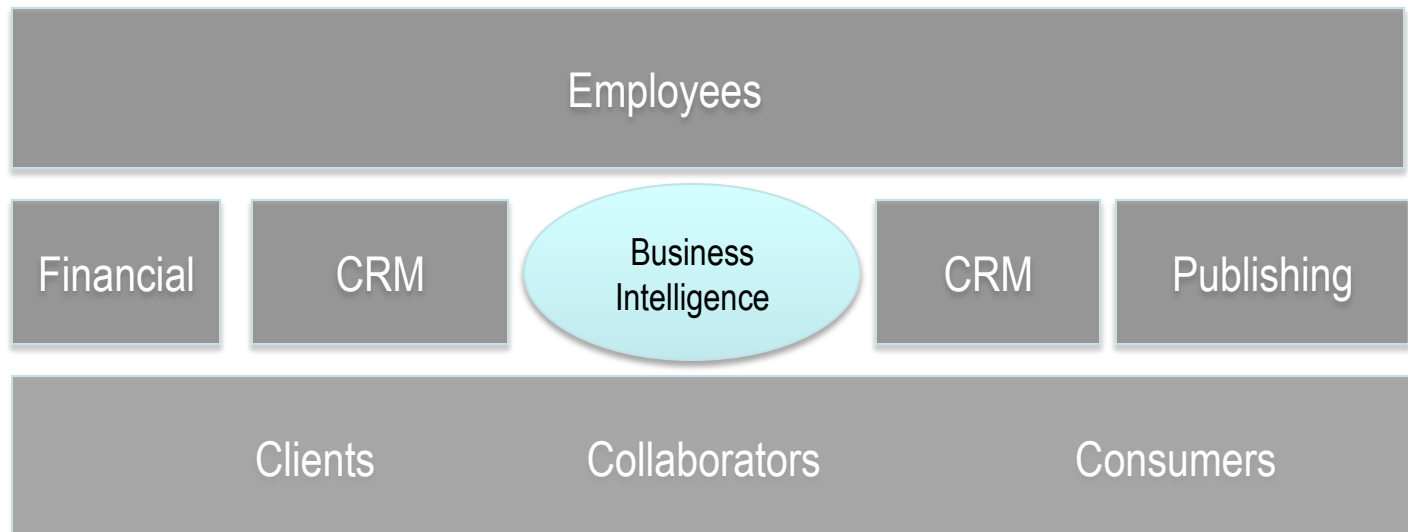
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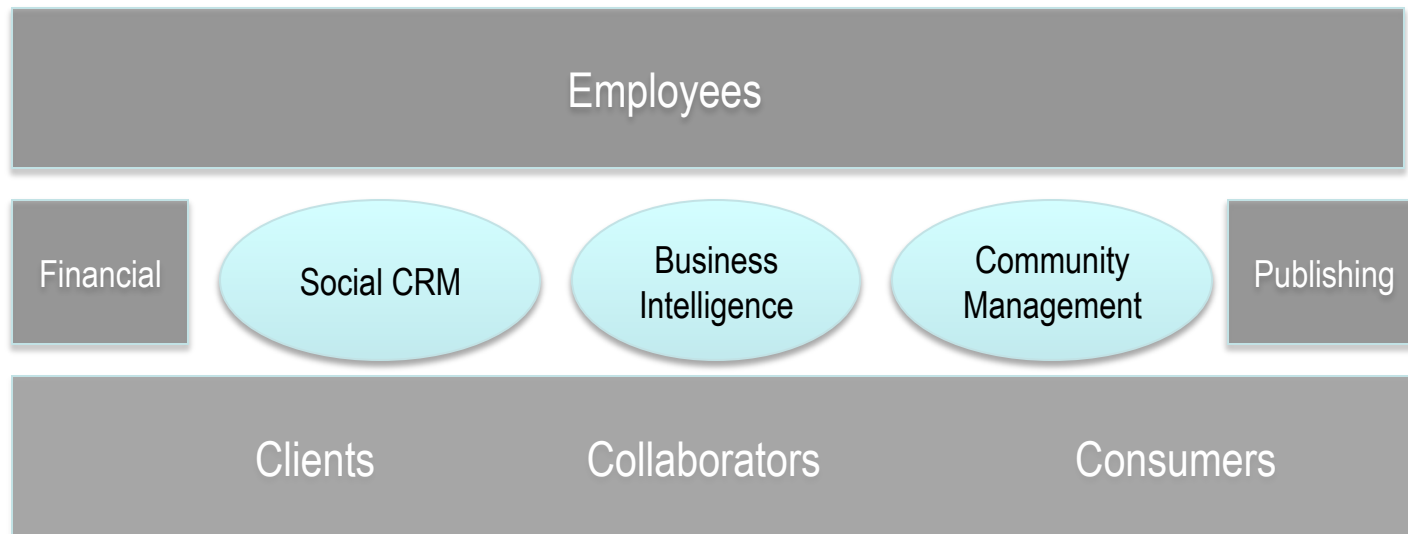
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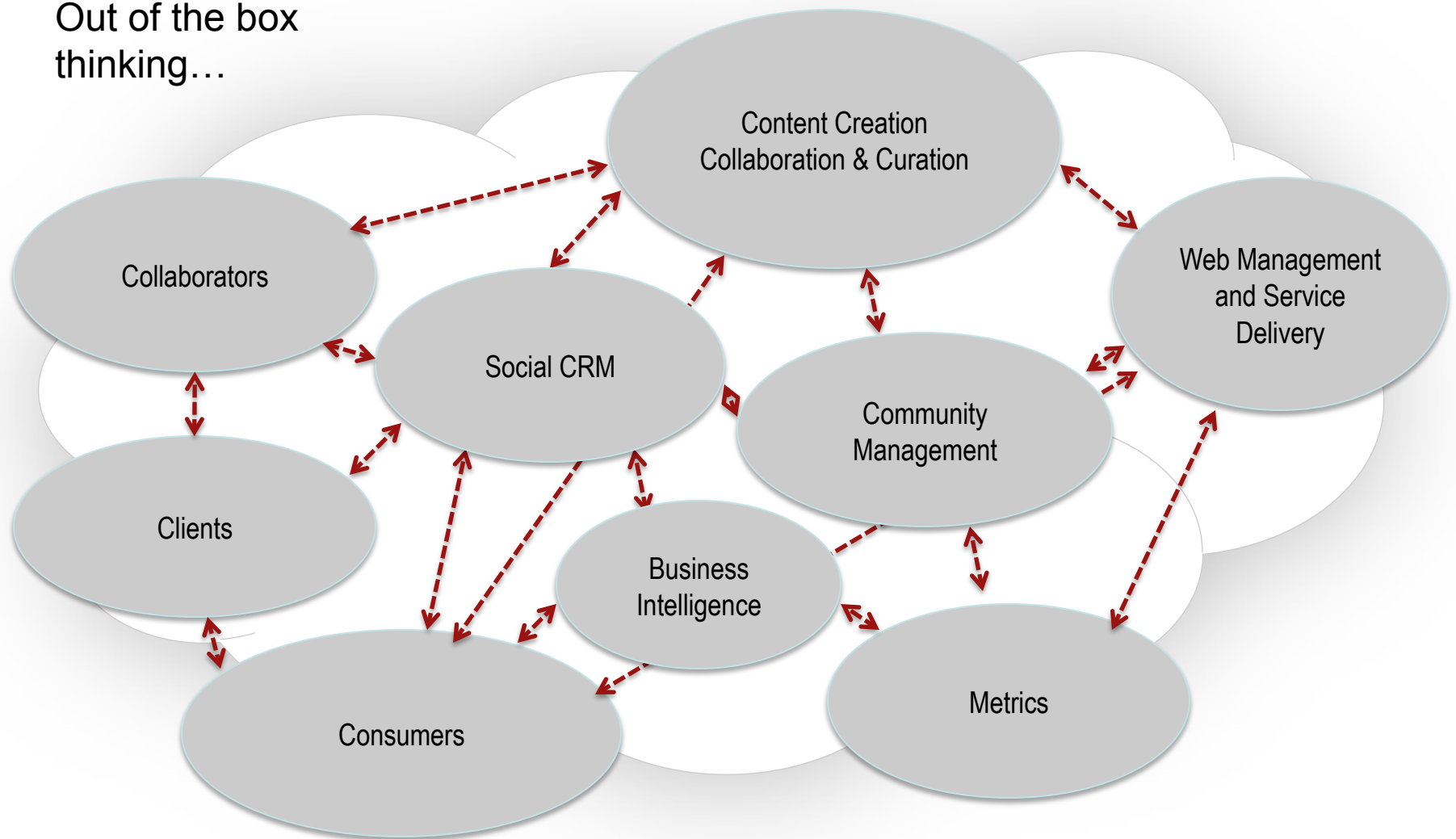
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The Relationship Based Enterprise



SPONSORED BY

Out of the box
thinking...



Open architecture works with our open architecture – integrating with internal and external, cloud based systems.

Extensibility – integrating our order process and financial reporting right into the system.

Metrics, reporting and business intelligence give us the information we need understand and manage our business more effectively.



SUGARCRM

Managing the conversations...

Mobile delivery takes our services outside the walls of the enterprise – and help cope with a BYOD world.

Flexibility to adapt to our business. Allows us to define a “standard” and a “social model” for sales as well as a very complex subscriber model – all in the same system.

Case, project, bug tracking – provide us the tools to manage IT more effectively

In Collaboration With...



More than simply an IT outsourcer – Chelsea is a strategic IT partner. They provide a disciplined, business and results focused approach to IT with complete alignment to our strategic directions and are fully integrated as business partners.

*Performance Adv*antage

The word "Performance Advantage" in a stylized font, with the "V" in "Advantage" replaced by a red line graph showing an upward trend on a grid background.

Sugar CRM knowledge and expertise. Real development experience. They have accelerated our development and brought us closer to our vision.

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itbusiness.ca
Business Advantage through Technology



One Site. Everything IT.
itWorldCanada.com
IDG CANADA



DIRECTION INFORMATIQUE



CDN



jlove@itworldcanada.com



Overview



#IBMSocialBiz #sugarcrm

- Customer Testimonials
- The New Rules of Social CRM (*Sugar*)
- From Social Media to Social CRM (*IBM*)
---- Coffee break -----
- How Do You Integrate Social Media (*Sugar*)
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SUGARCRM.





#IBMSocialBiz #sugarcrm

The New Rules of Social CRM

Jan Sysmans

Senior Director Product Marketing

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.”

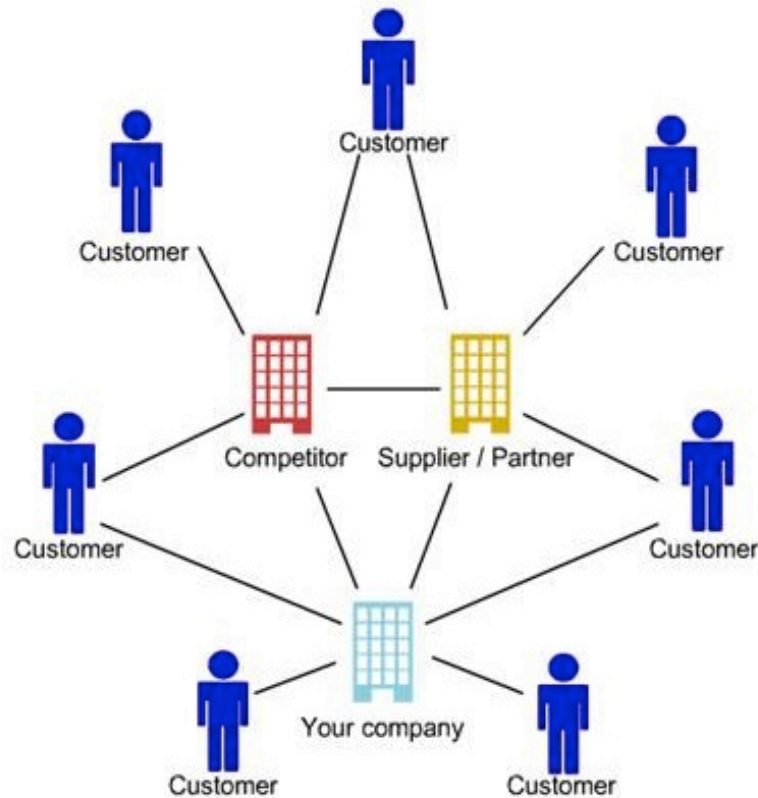
Change

SPONSORED BY

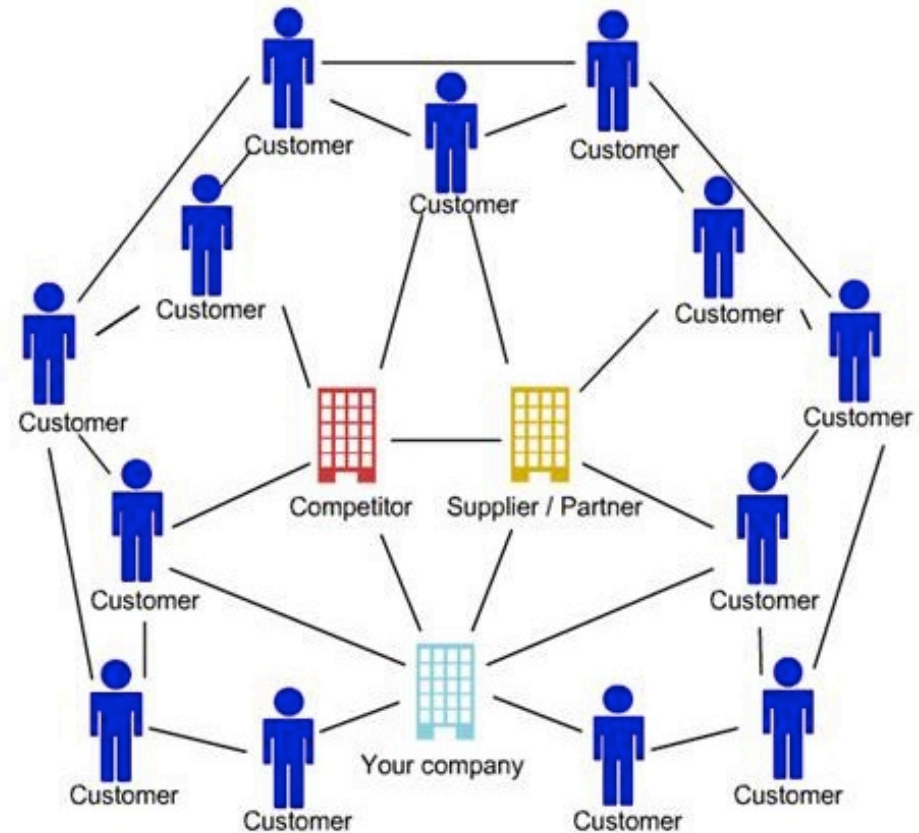


Change: Customers Believe Customers Not Companies!

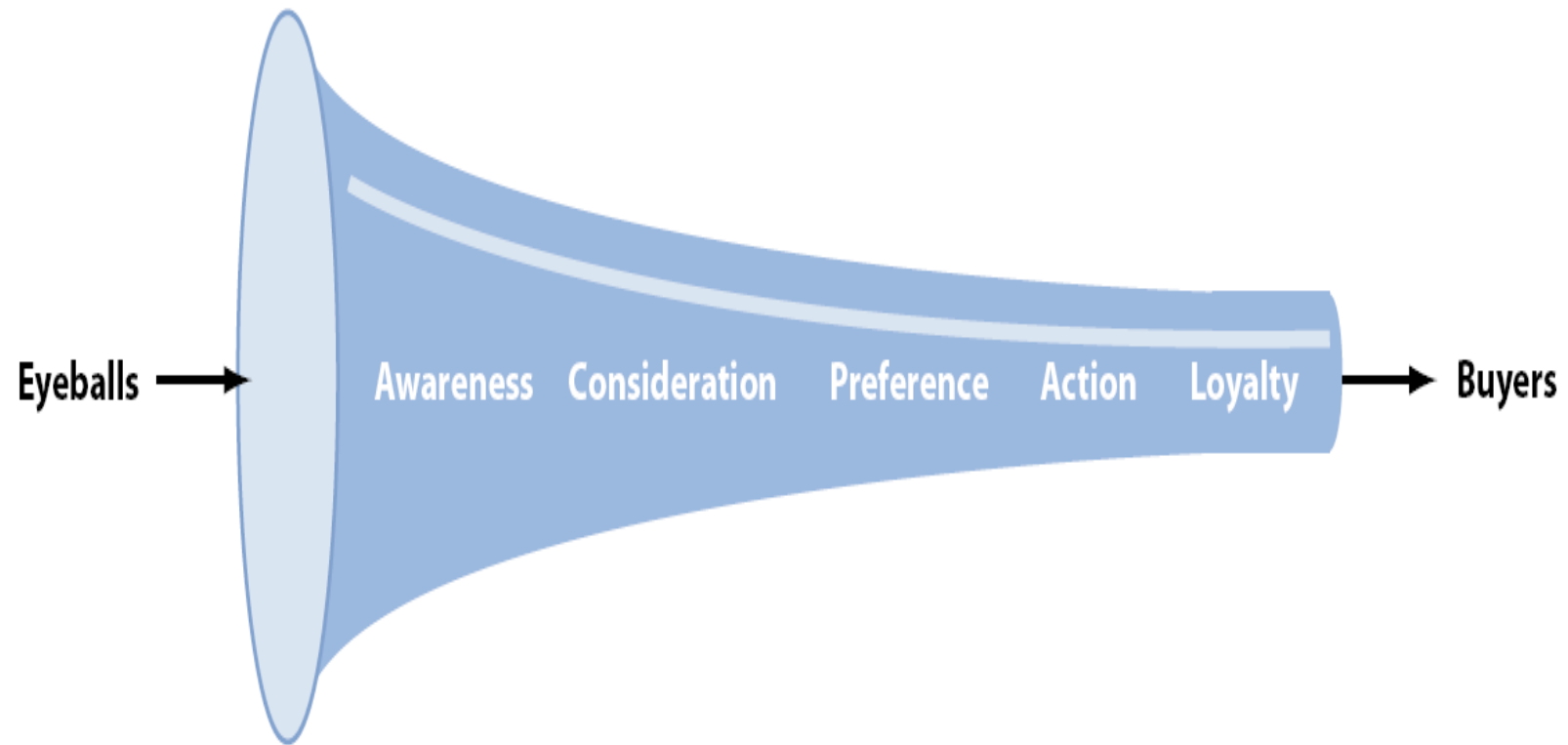
Old World CRM



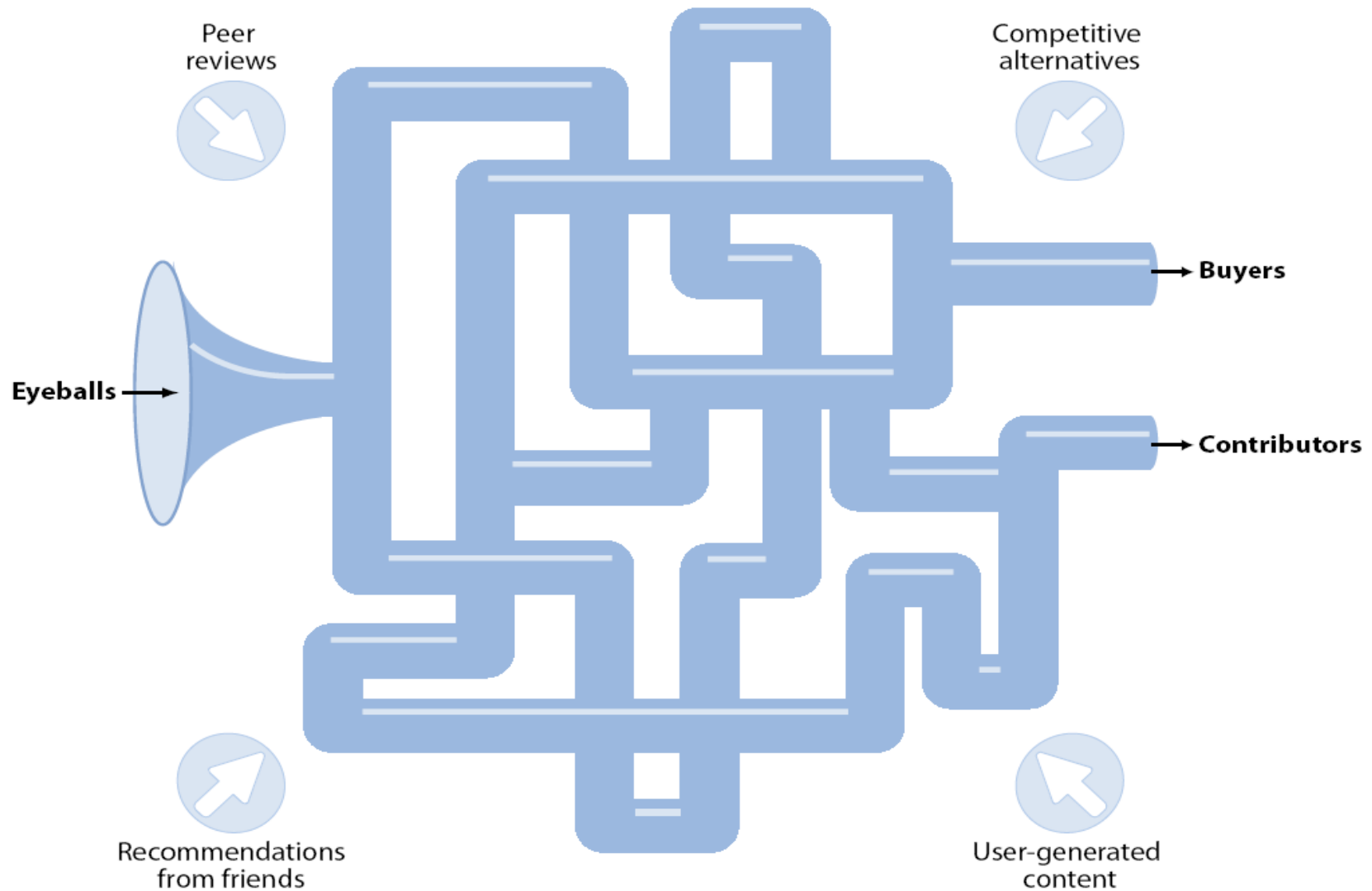
Social CRM



Change: Traditional Buying Model



Change: New Buying Model



Change: Social is Changing Business



The New Rules

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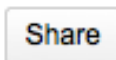
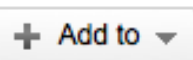
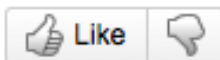
Rule #1: You Are Not In Control

United Breaks Guitars

sonsofmaxwell

17 videos

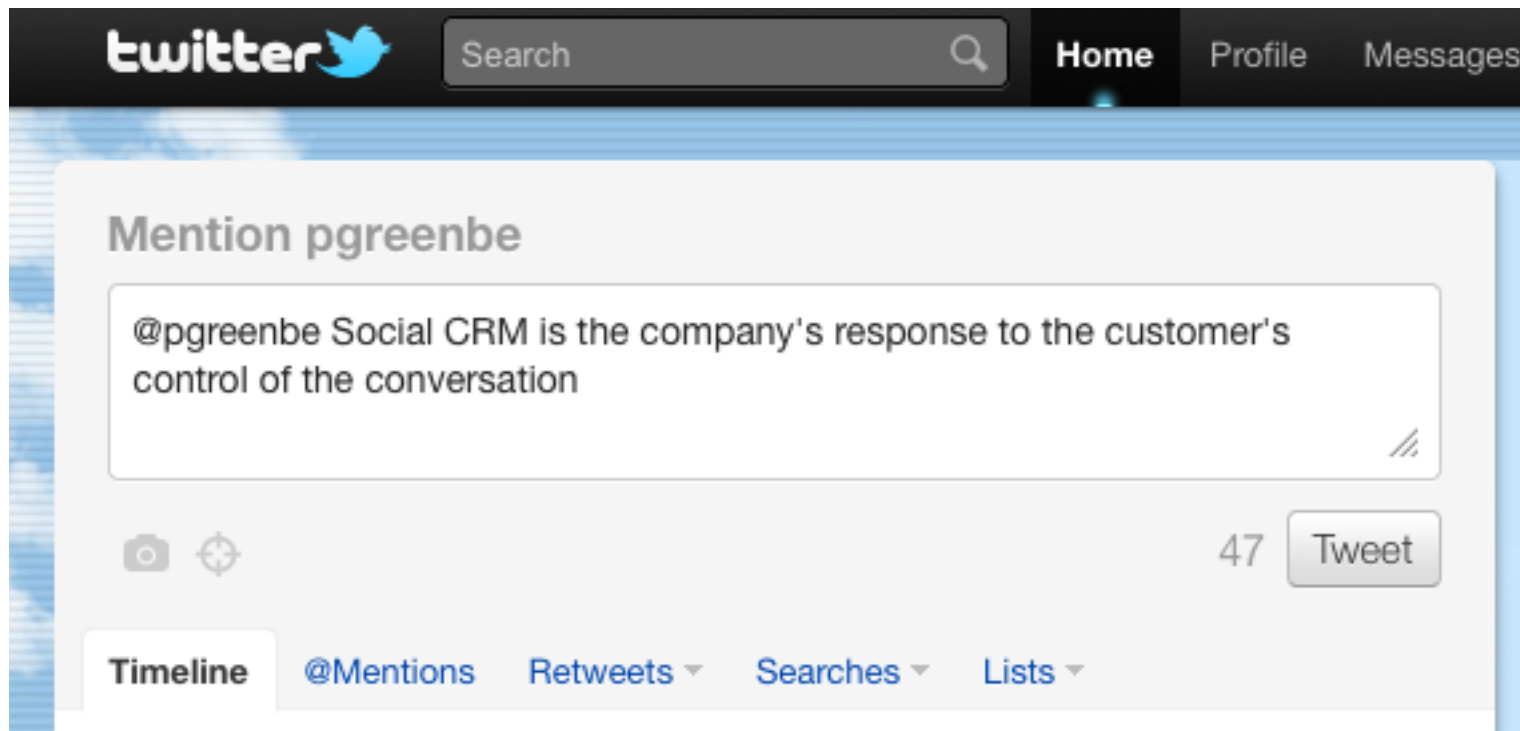
Subscribe



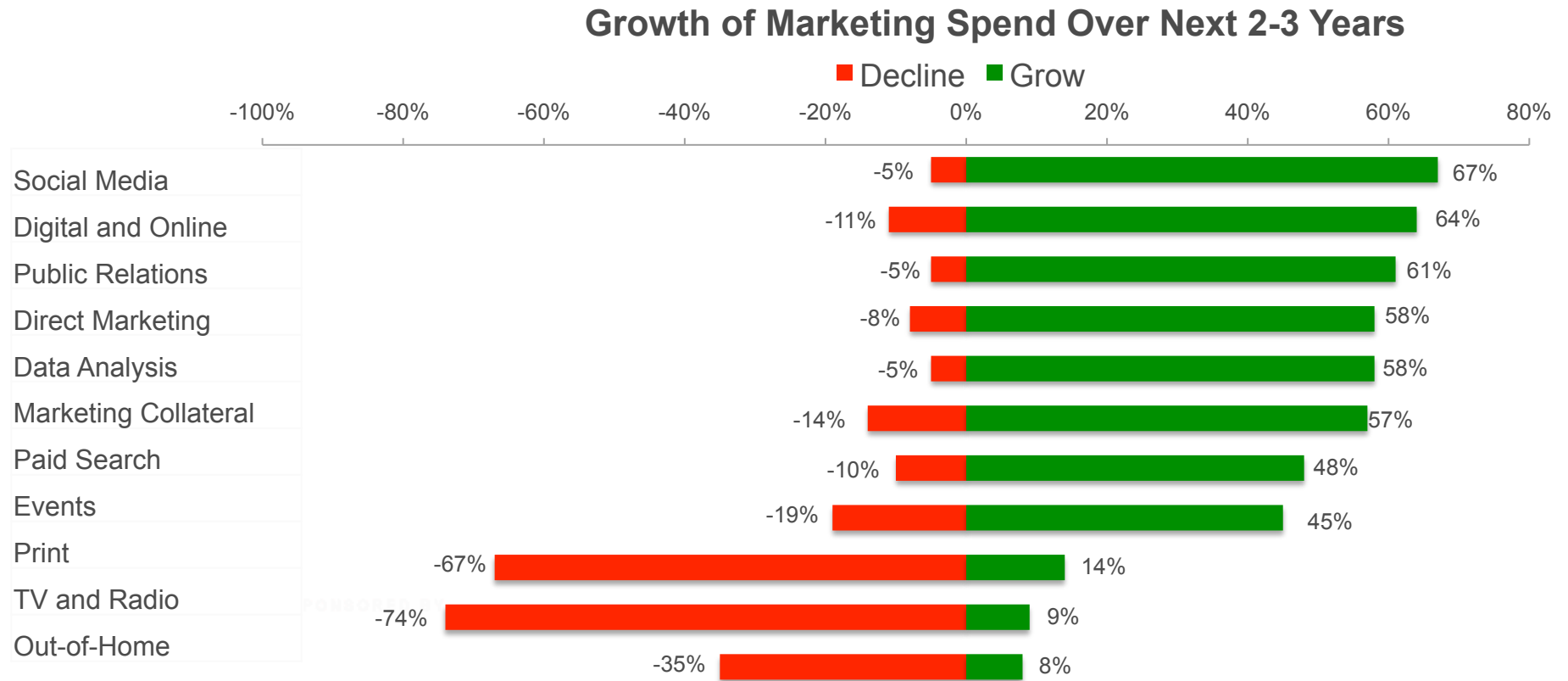
10,836,195



Customers Manage You

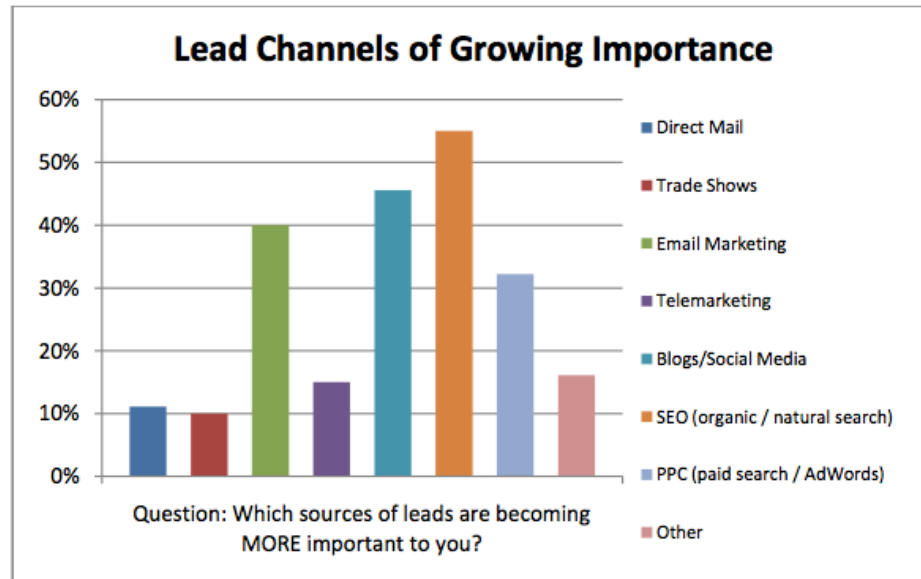


Rule #2: Traditional Marketing is Declining

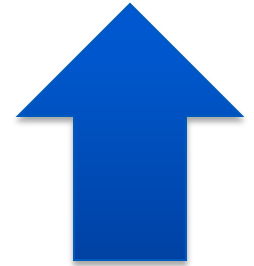


Source: Booz & Company's B2B Marketing Survey 2010

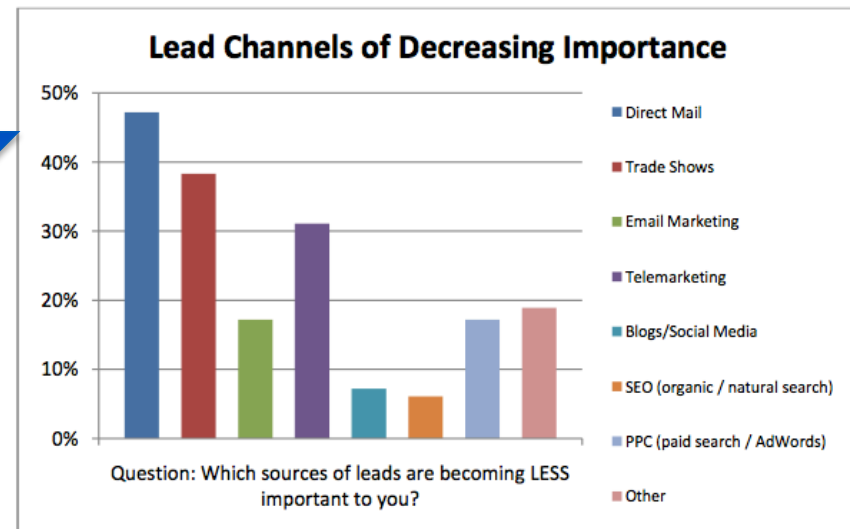
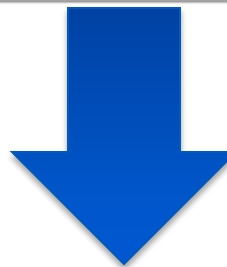
How People Connect with Companies



Inbound
Permission
Customer-Driven



Outbound
Interruption
Vendor-Driven



Rule #3: Customer Service IS Marketing



Start a Chat

Send an Email

Sales: 1-800-961-2888



COMPANY

MANAGED HOSTING

CLOUD HOSTING

EMAIL & APPS

CLOUD BUILDERS

Hosting Solutions

Why Rackspace

Partner Program

Information Center

Blog Community

Hosting Knowledge

ALL BACKED BY
**FANATICAL
SUPPORT®**

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

Find Out More

JOE
RACKER
since: 2005



MANAGED HOSTING

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

LEARN
MORE

CLOUD HOSTING

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

[More about Cloud Computing](#)

NEW! Managed Service Level Now Available

LEARN
MORE

EMAIL & APPS

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

[More about Email & Apps](#)

LEARN
MORE

LET'S TALK

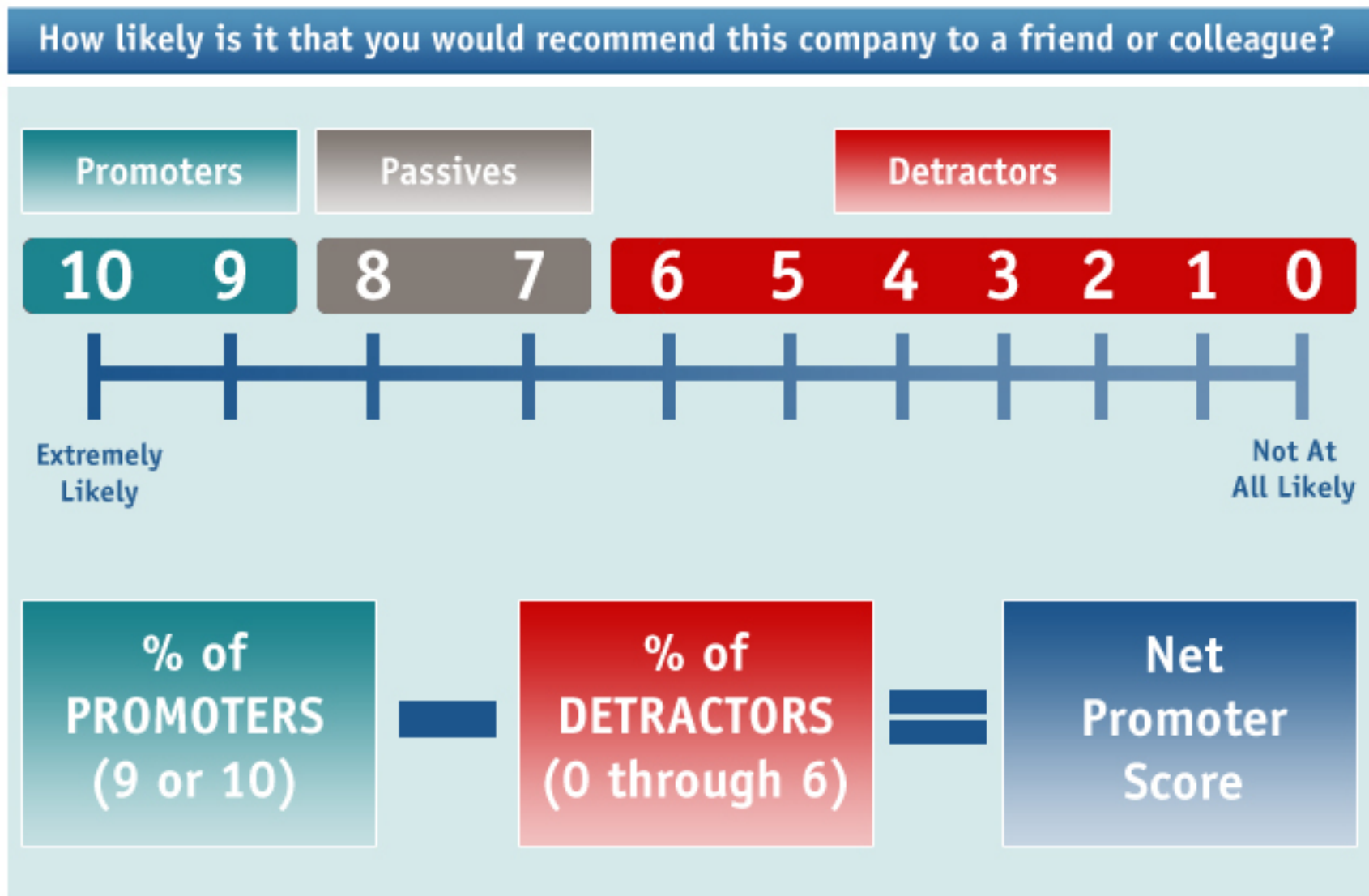
SALES QUESTIONS?
start a Live Chat

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

Get Social
The Social Business Roadshow

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The Ultimate Question



Rule #4: Join the Conversation

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.

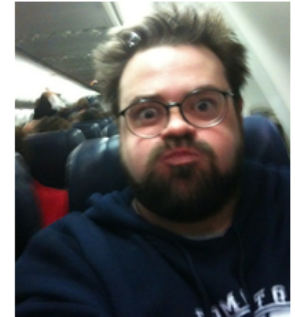
The incident, which took place on Saturday, resulted in dozens of Tweets on [Smith's account](#) (he has 1.6 million followers at the time of writing). A brief sampling:

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”

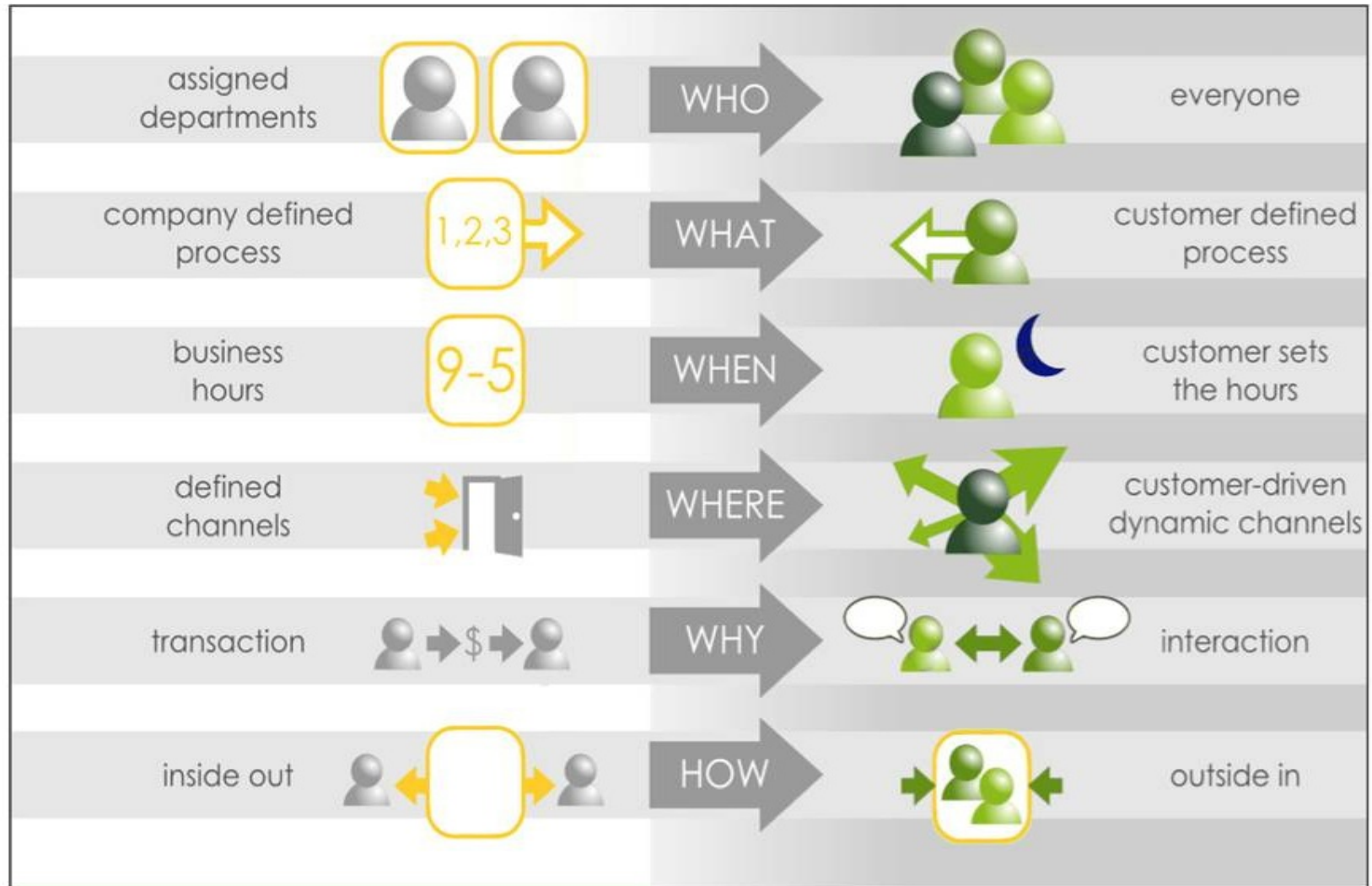
Rule #5: Integrate People with Technology



Sydney restaurant replaces menus with iPads

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

Evolution



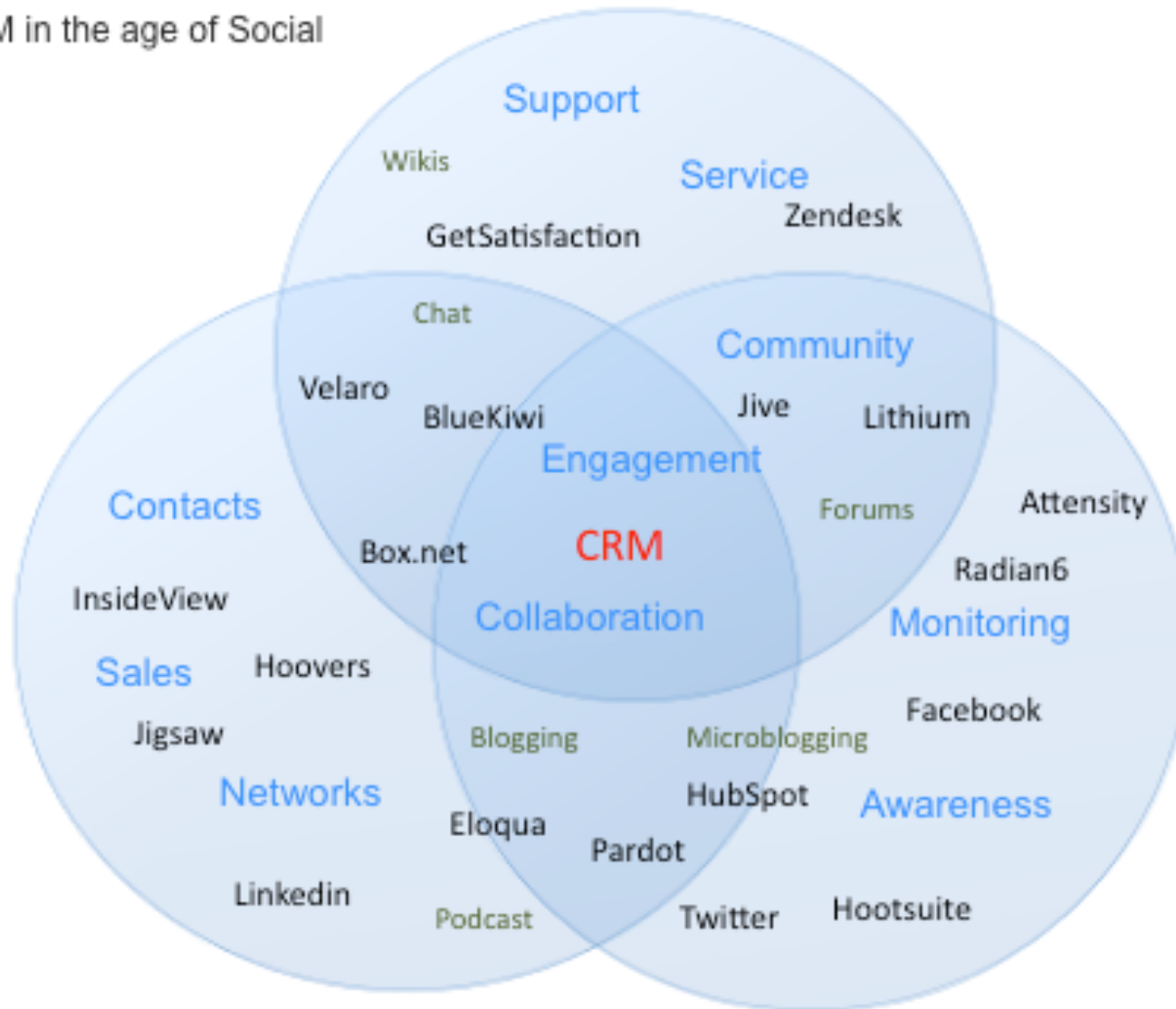
What Now?

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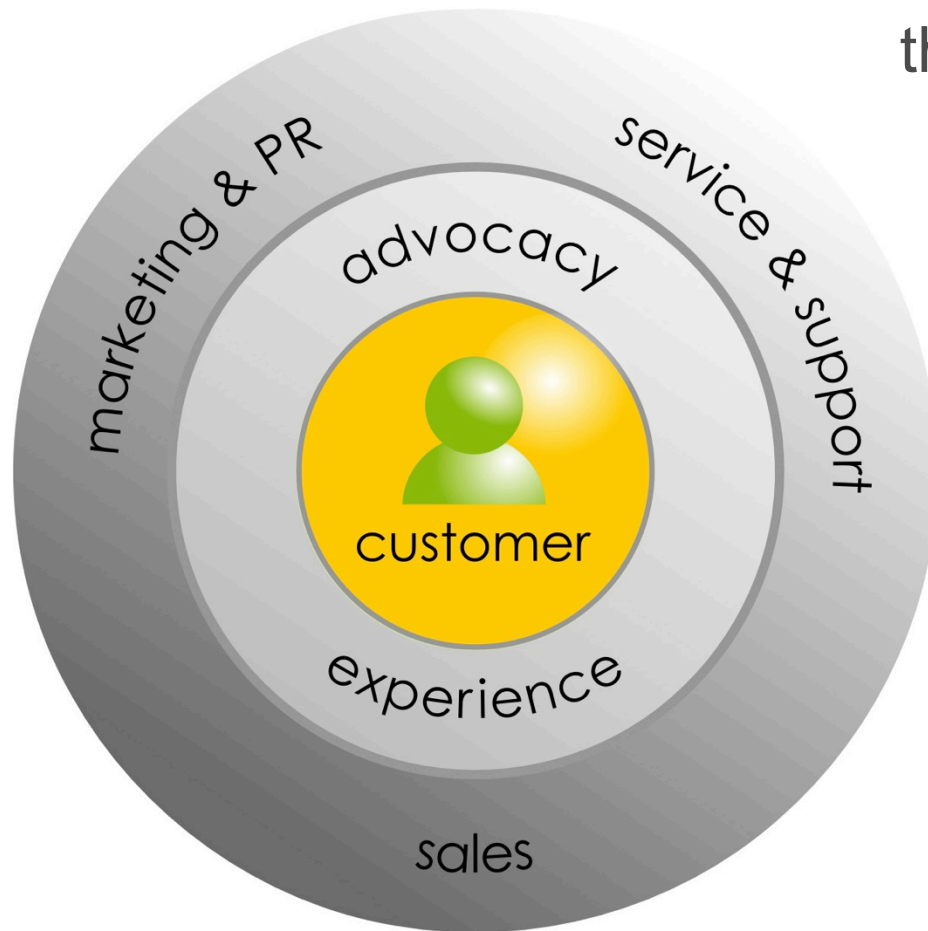
Bring Order to Customer Management

CRM in the age of Social



Get Social

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



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

Overview



#IBMSocialBiz #sugarcrm

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

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#IBMSocialBiz #sugarcrm

From Social Media to Social CRM

Kyle Farnand,

Executive Social Business and Cloud Consultant

IBM Collaboration Solutions



Please Take out your phones.....



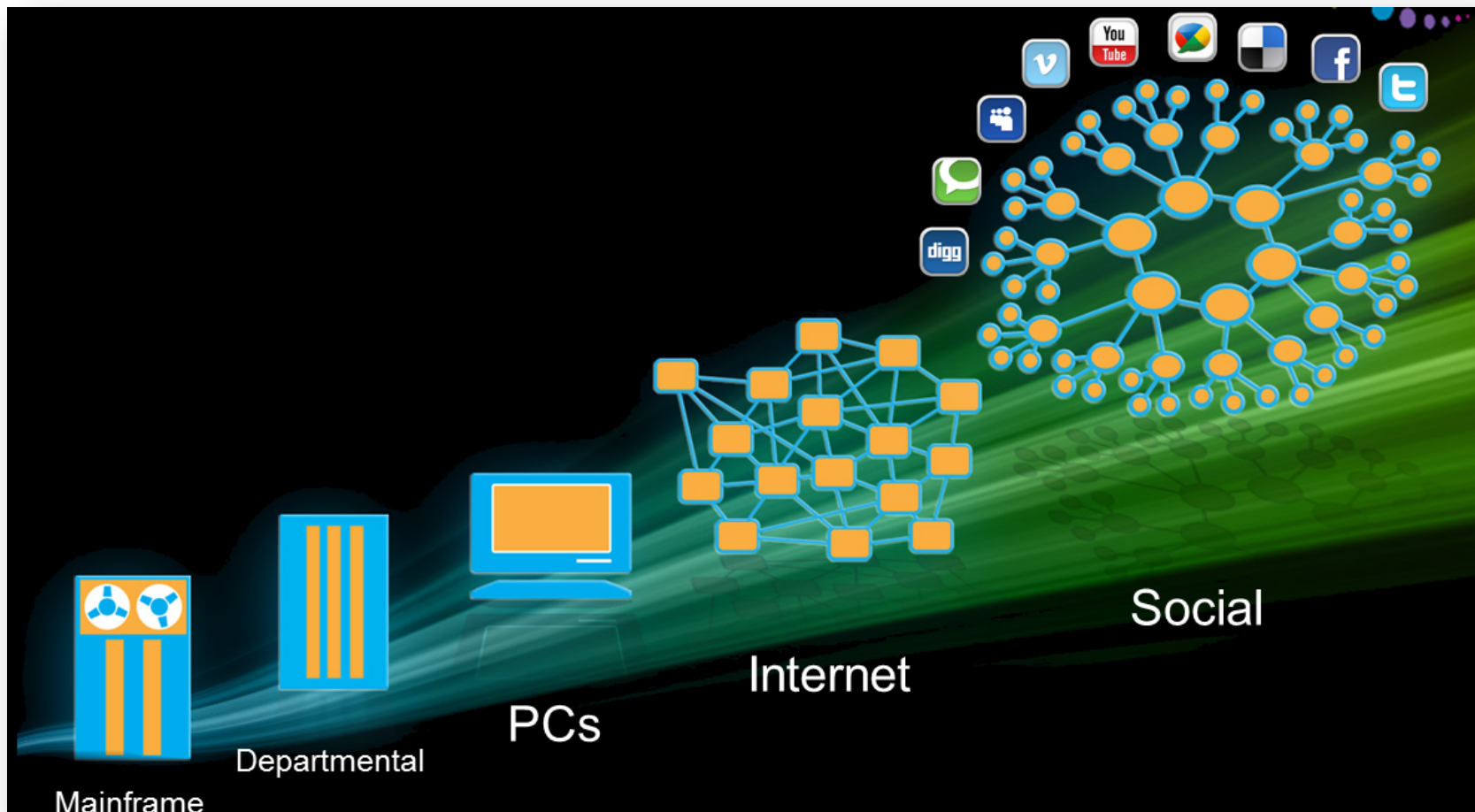
#SugarCRM
#IBMSocialBiz



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The Fifth IT Era: The era of Social Business



Power of Social Media



“Sharing”

SPONSORED BY

“Digital Trail”

Why should you care? = Speed

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

about 19 hours ago from TweetDeck



davepeck

Dave Peck

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

about 19 hours ago from TweetDeck in reply to davepeck



SouthwestAir

Southwest Airlines

A Social Business embraces networks of people to create business value



ENGAGED
TRANSPARENT
NIMBLE

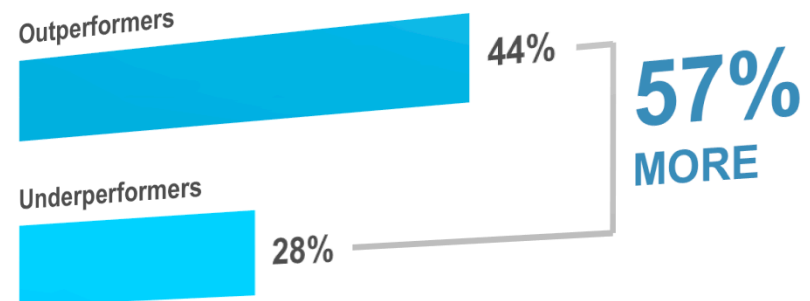
Why should you care?

Engaging

Transparent

Nimble

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



Source: IBM Institute for Business Value Study 2010

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

Social Business Catalysts: Top Down and Bottom Up



CEO

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



Multiple Divisions

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Social Business Catalysts: Top Down and Bottom Up

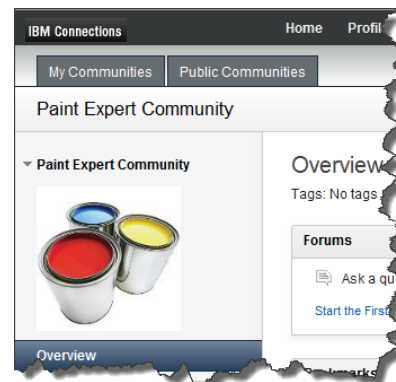


Sharing Knowledge
Accident
Deliver 1m+ sales of
single product



298K Employees
17K Salary
Managers

Subject Matter
Expert



Move from Document Centric to People / Social Centric Model

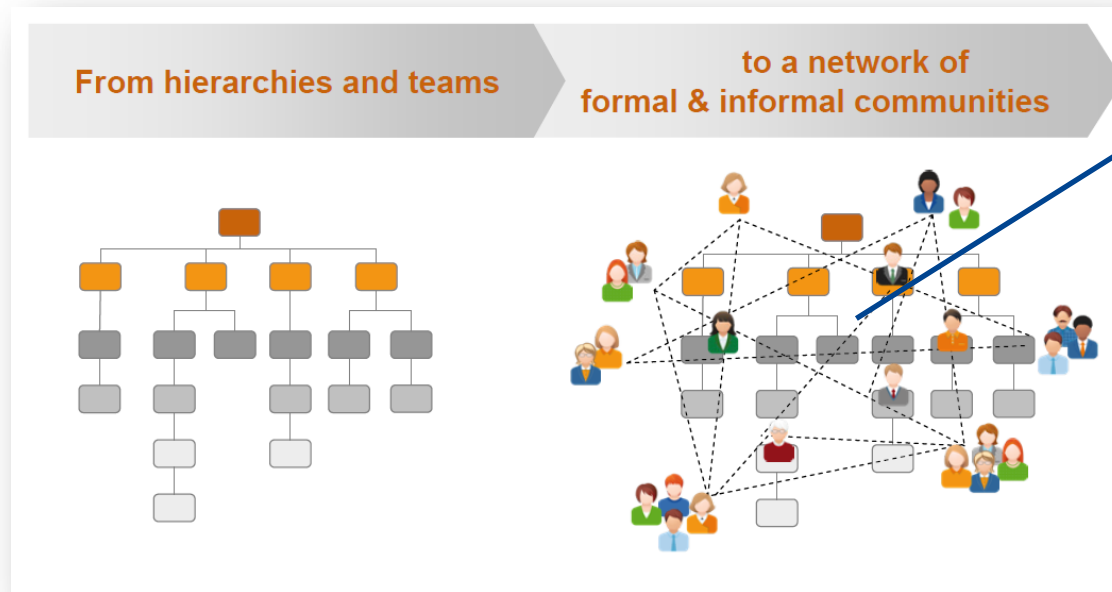


Document Centric



People / Social Centric

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



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

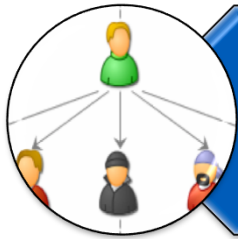
Shift also represents a change in business communication. The old approach was to mandate from above. The new approach is to enable the enterprise to collaborate where and when it needs to, with a wide array of tools, resources and guidance. Shift is the collaboration platform, the place and the process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

Change in Thinking by Role: Why do they care?



Company

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



Line of Business

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



Manager

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



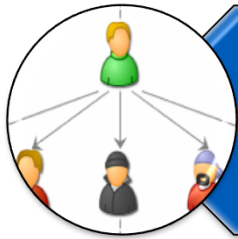
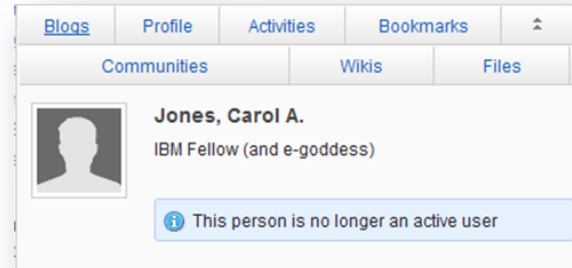
Employee

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

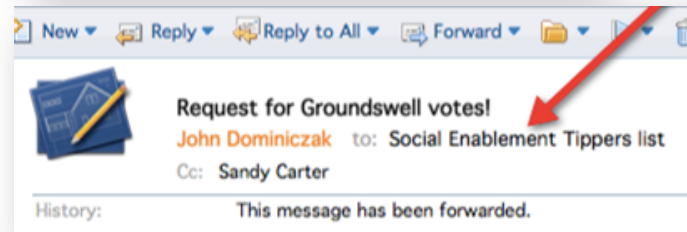
Change in Thinking by Role: Why do they care?



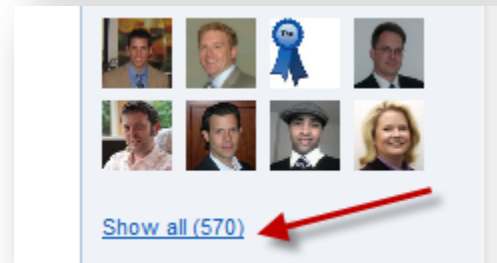
Company



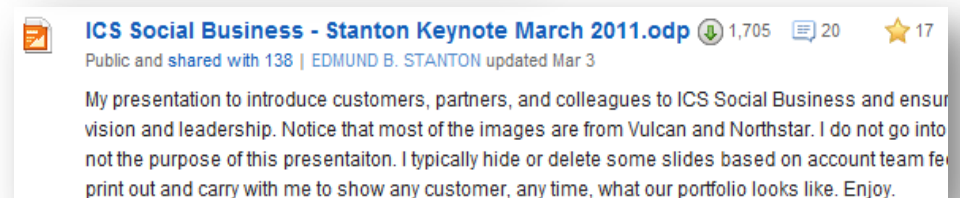
Line of Business



Manager



Employee



Crowdsourcing: Open Product Development

IBM Connections Idea Blog

[New Idea](#)


1 - 30 of 171

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

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

128

 Vote


Do you want to see folders within a Community

Simon Vaughan | Mar 30 | Tags: [apps_community_improvemen...](#) [community_improvements_fi...](#) | [13 comments](#) | [640 visits](#)

One thing that our users have been asking for is 'Folders' within a community. Each folder should allow a user to determine who can access the files within the folder and would be a major plus point for the adoption of Connections in an organisation

Sep 25: Simon Vaughan edited this idea

105

 Vote

Community Calendar


Colleen Walker | Mar 31 | Tags: [community_improvements_ge...](#) [apps_community_improvemen...](#) | [12 comments](#) | [514 visits](#)

A calendar where you can post your meetings and events for the community.

Sep 25: Simon Vaughan edited this idea

Graduated

99

 Vote


Poll / Survey app in connections

Simon Vaughan | Mar 31 | Tags: [apps_new](#) [apps_others](#) | [10 comments](#) | [447 visits](#)

In a future version of Connections, I would like to see a Poll / Survey app

Sep 25: Simon Vaughan edited this idea

91

 Vote


Like and share buttons on Profile Updates

Toni Hintikka | Mar 31 | Tags: [activity_stream_improveme...](#) | [12 comments](#) | [376 visits](#)

Our customers say that users will often compare Connections to Facebook. And At least Like button on profile updates would be nice.

Sep 25: Simon Vaughan edited this idea

82

 Vote

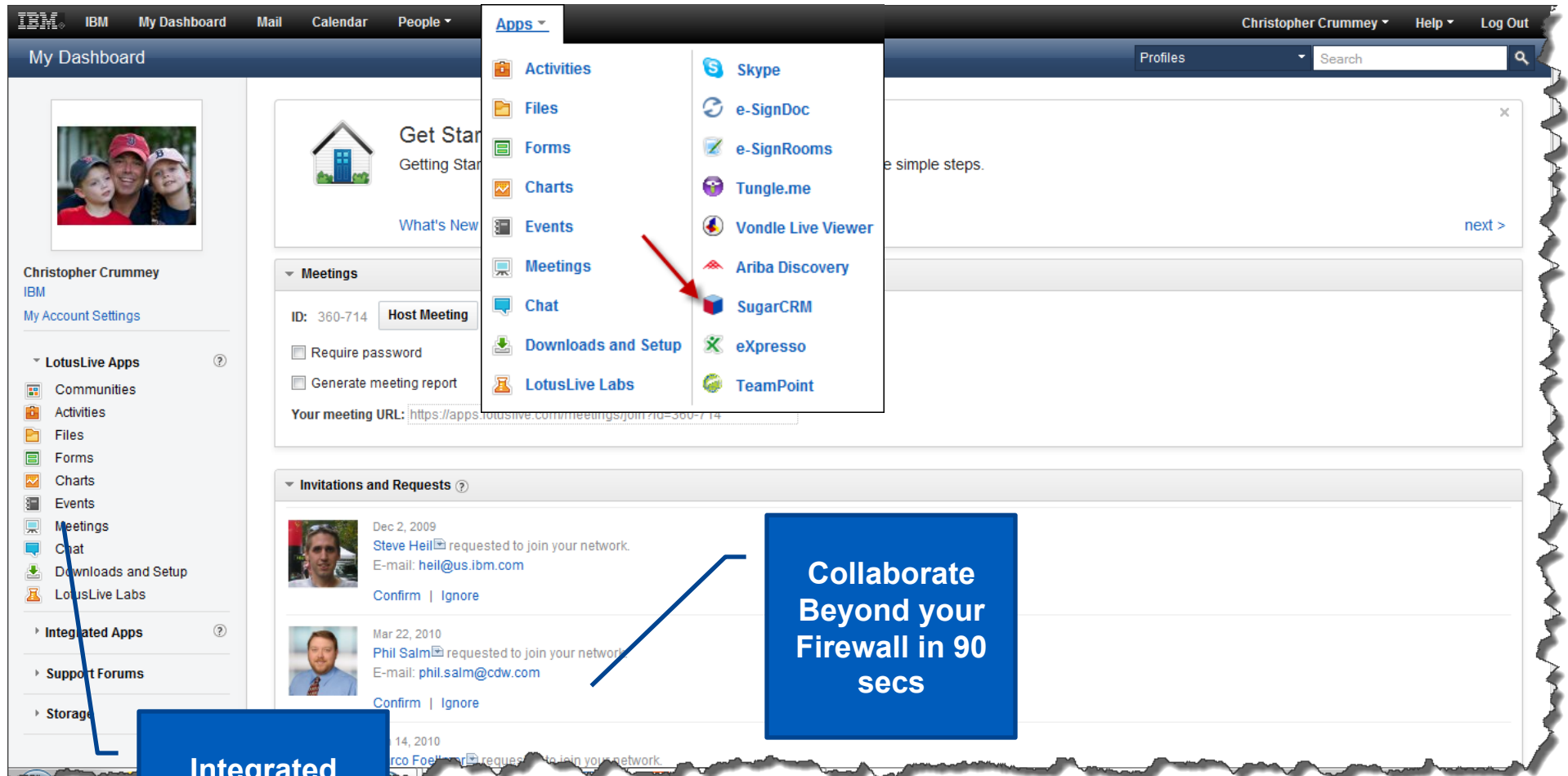
The ability to mention someone in a status update and show this in thier activity stream / River of news (by a @username)

Simon Vaughan | Apr 1 | Tags: [activity_stream_improveme...](#) | [4 comments](#) | [147 visits](#)

One thing that would be good would be to allow me to 'mention' someone in a status update (via the @username tag) and for the update to show in a users 'river of news' or 'activity stream'

Socailcast does this quite well (via the @mention)

Social business in the cloud

A screenshot of the LotusLive web application interface. The top navigation bar includes "IBM", "My Dashboard", "Mail", "Calendar", "People", and "Apps". The "Apps" dropdown menu is open, showing a list of integrated applications: Activities, Files, Forms, Charts, Events, Meetings, Chat, Downloads and Setup, LotusLive Labs, Skype, e-SignDoc, e-SignRooms, Tungle.me, Vondle Live Viewer, Ariba Discovery, SugarCRM, eXpresso, and TeamPoint. A red arrow points to the "SugarCRM" icon. The main dashboard area shows a "My Dashboard" section with a user profile for Christopher Crummey, a "Get Started" section, and a "Meetings" section with a "Host Meeting" button. Below the "Meetings" section is an "Invitations and Requests" section showing two requests to join the network. A blue box with the text "Collaborate Beyond your Firewall in 90 secs" is overlaid on the right side of the interface. Another blue box with the text "Integrated Collaboration Solutions in the Cloud" is overlaid on the bottom left of the interface.

Sugar on IBM: Deploy on Cloud / OnPremise



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

Overview



#IBMSocialBiz #sugarcrm

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

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#IBMSocialBiz #sugarcrm

Networking and Coffee Break

15-20 minutes



Overview



#IBMSocialBiz #sugarcrm

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#IBMSocialBiz #sugarcrm

How Do You Integrate Social Media

Jan Sysmans

Senior Director Product Marketing

SugarCRM



Start With the Customer



Start with
the customer



Put the customer at the center



CRM: Enable the sales edge

INNER CORE

SALES EDGE

CUSTOMERS

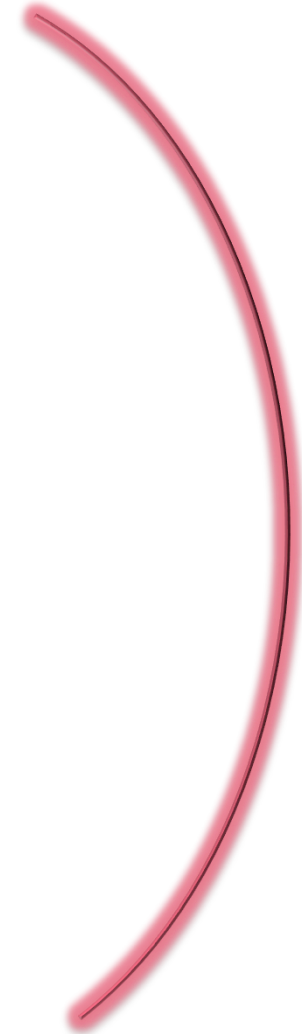


SALES

CUSTOMER
SERVICE

CALL
CENTER

MARKETING



SPONSORED BY

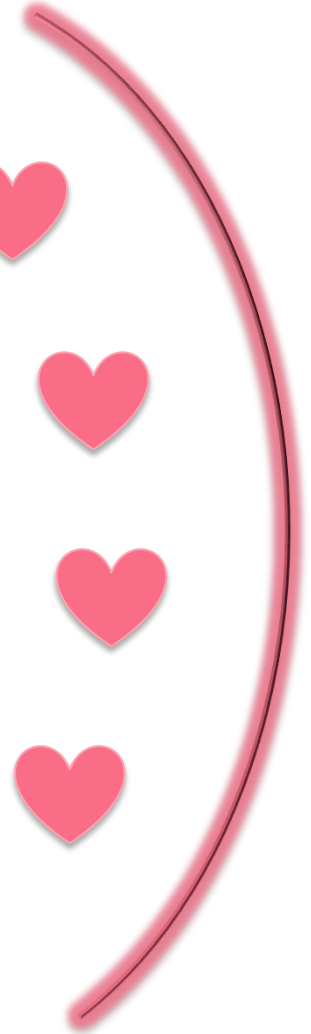
Social CRM: Enable the customer edge

INNER CORE

SALES EDGE

PARTNERS

CUSTOMERS



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Basics of an Open, Social CRM



CRM Made Simple

Intuitive

Open

Flexible

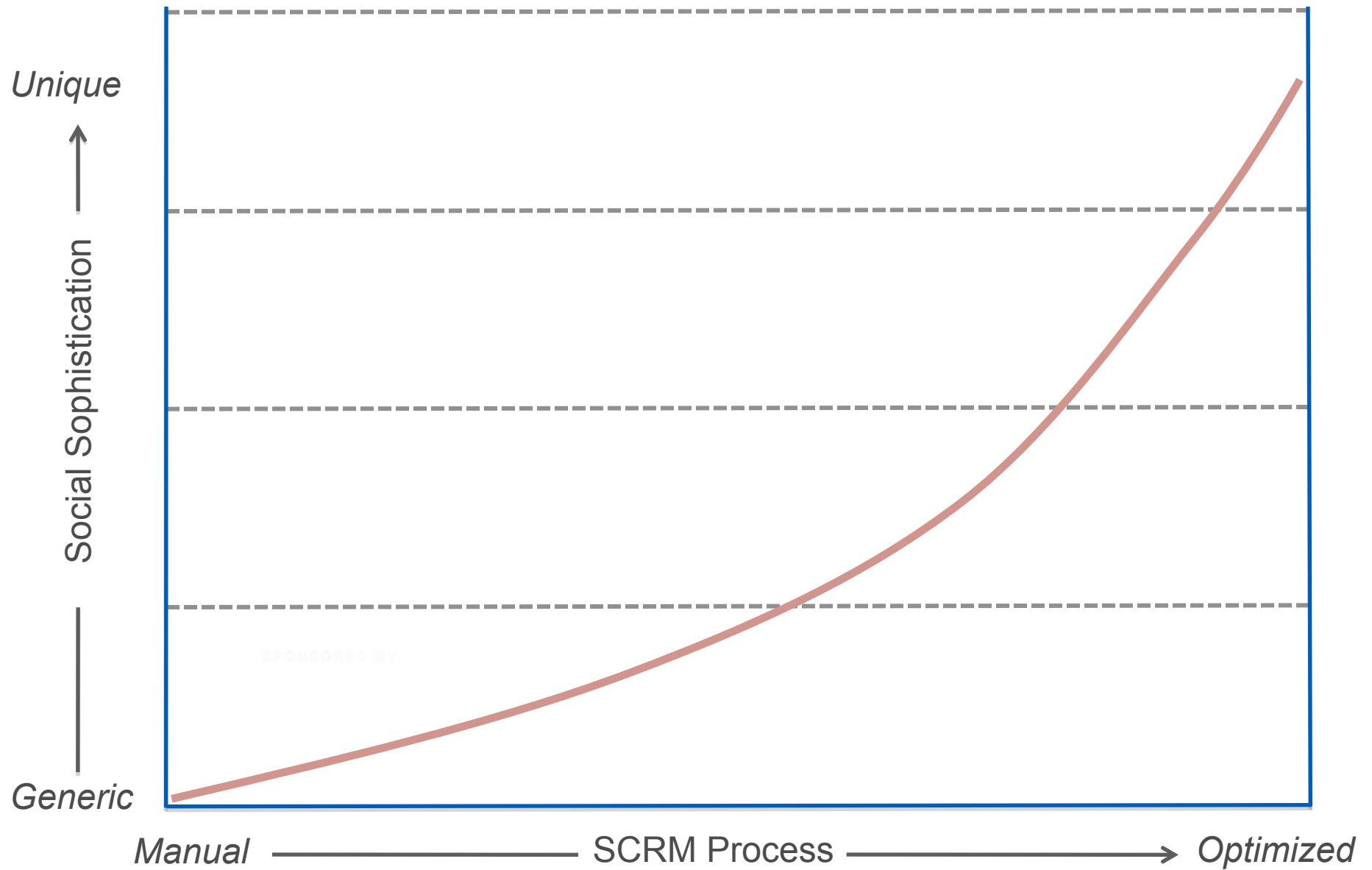
Social CRM = Open CRM = Mobile CRM

Where Do You Start?

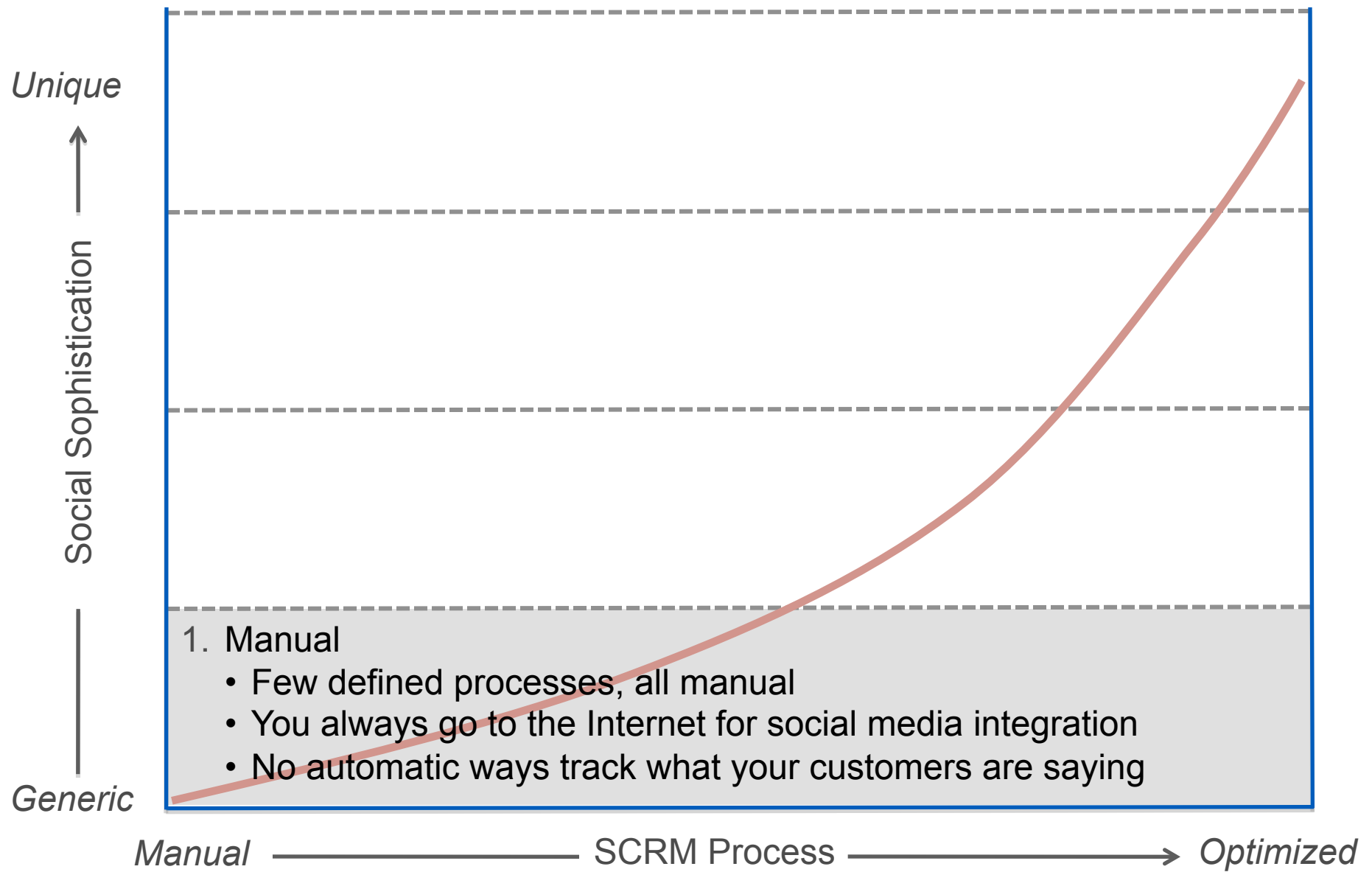


Think Big
Start Small
Move Fast

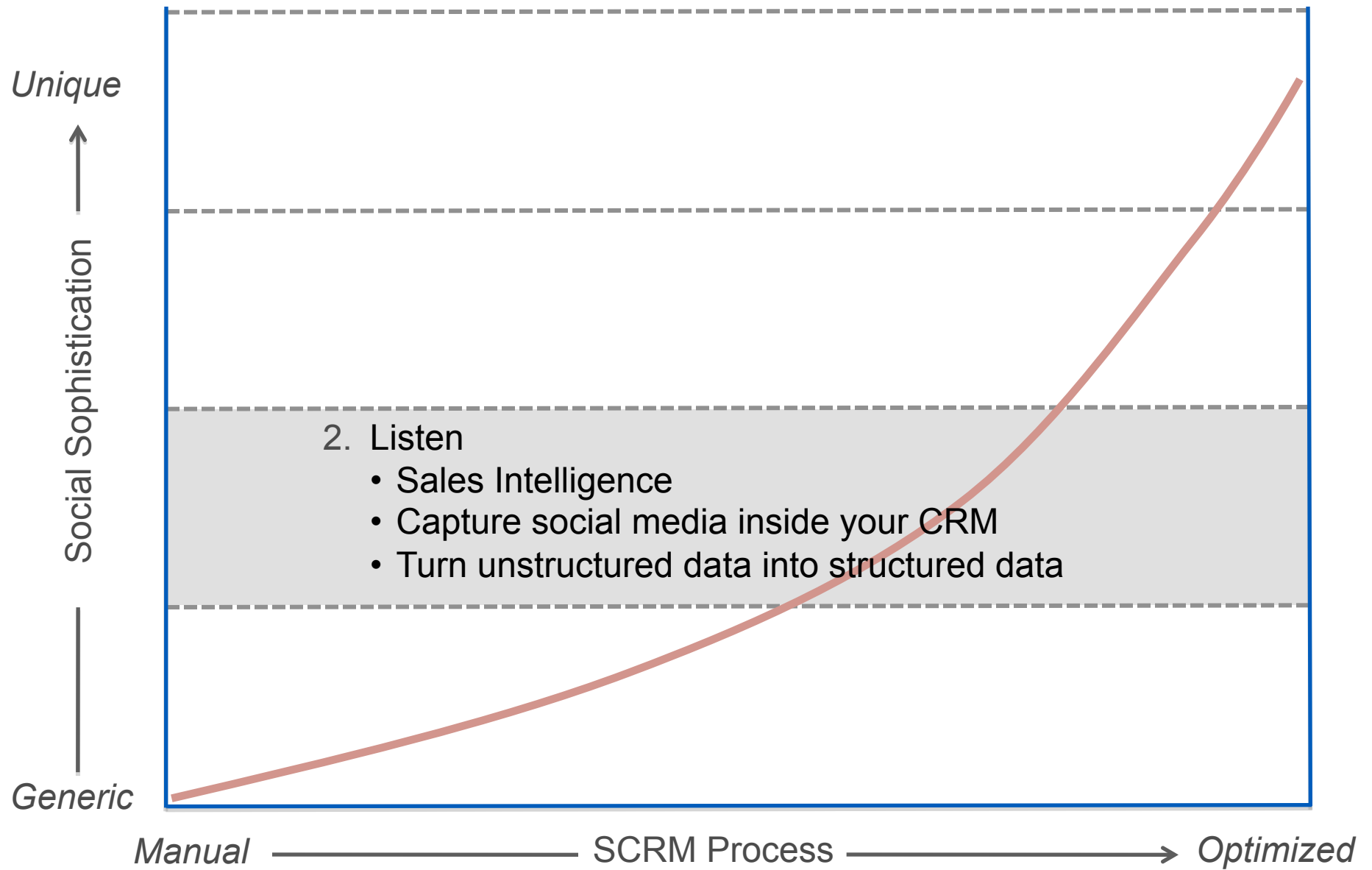
Social CRM Adoption Curve



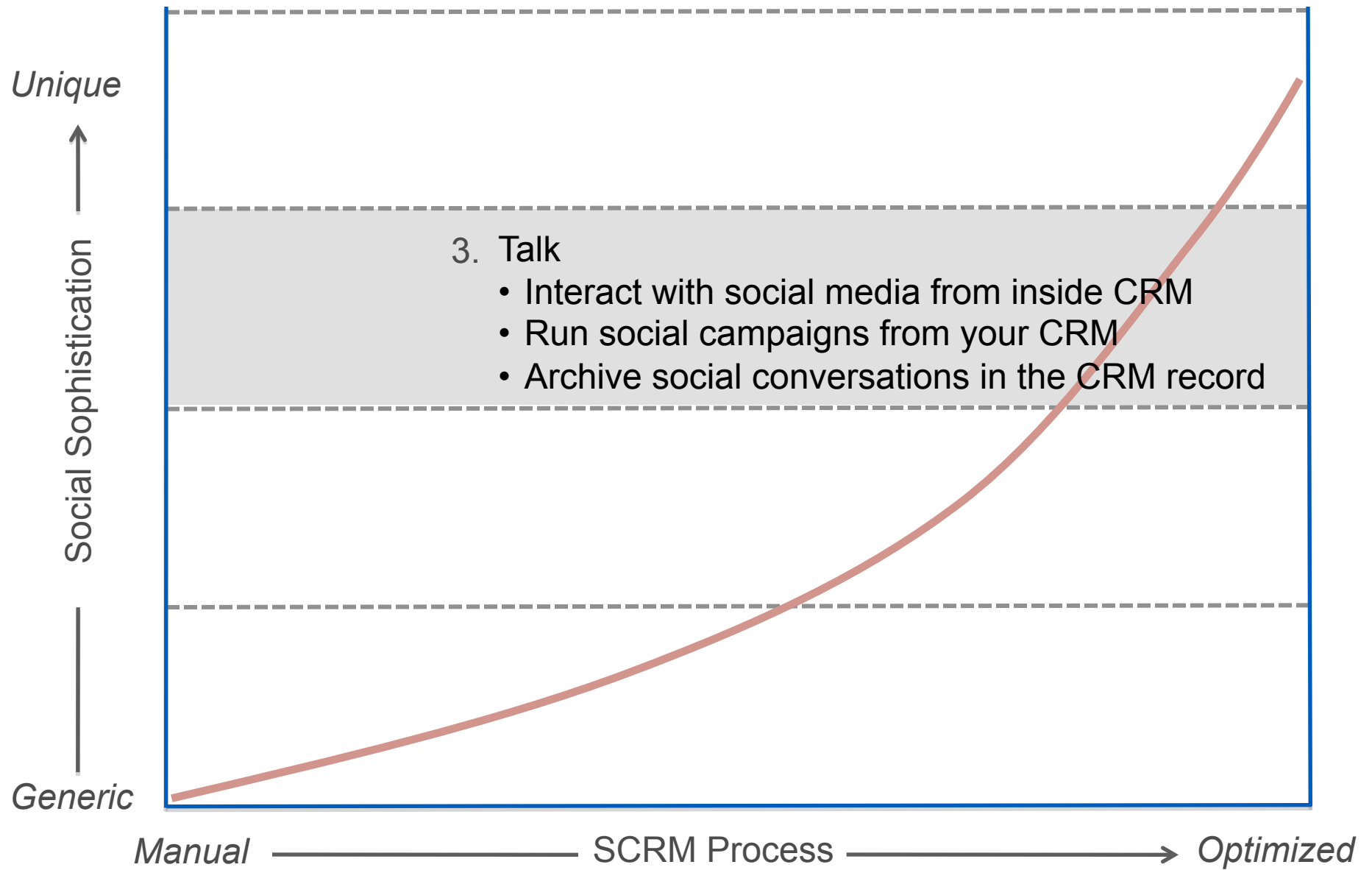
Social CRM Adoption Curve



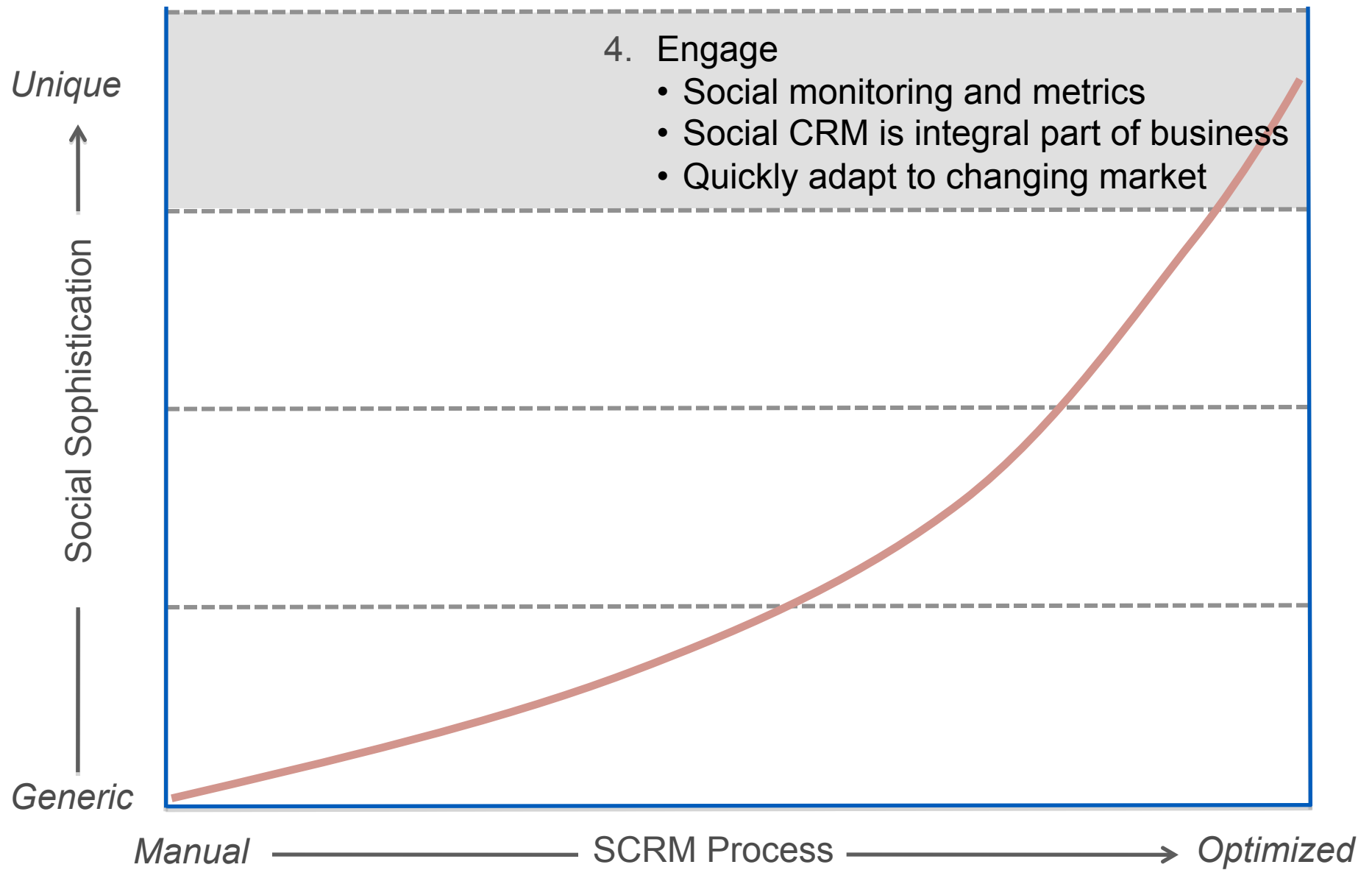
Social CRM Adoption Curve



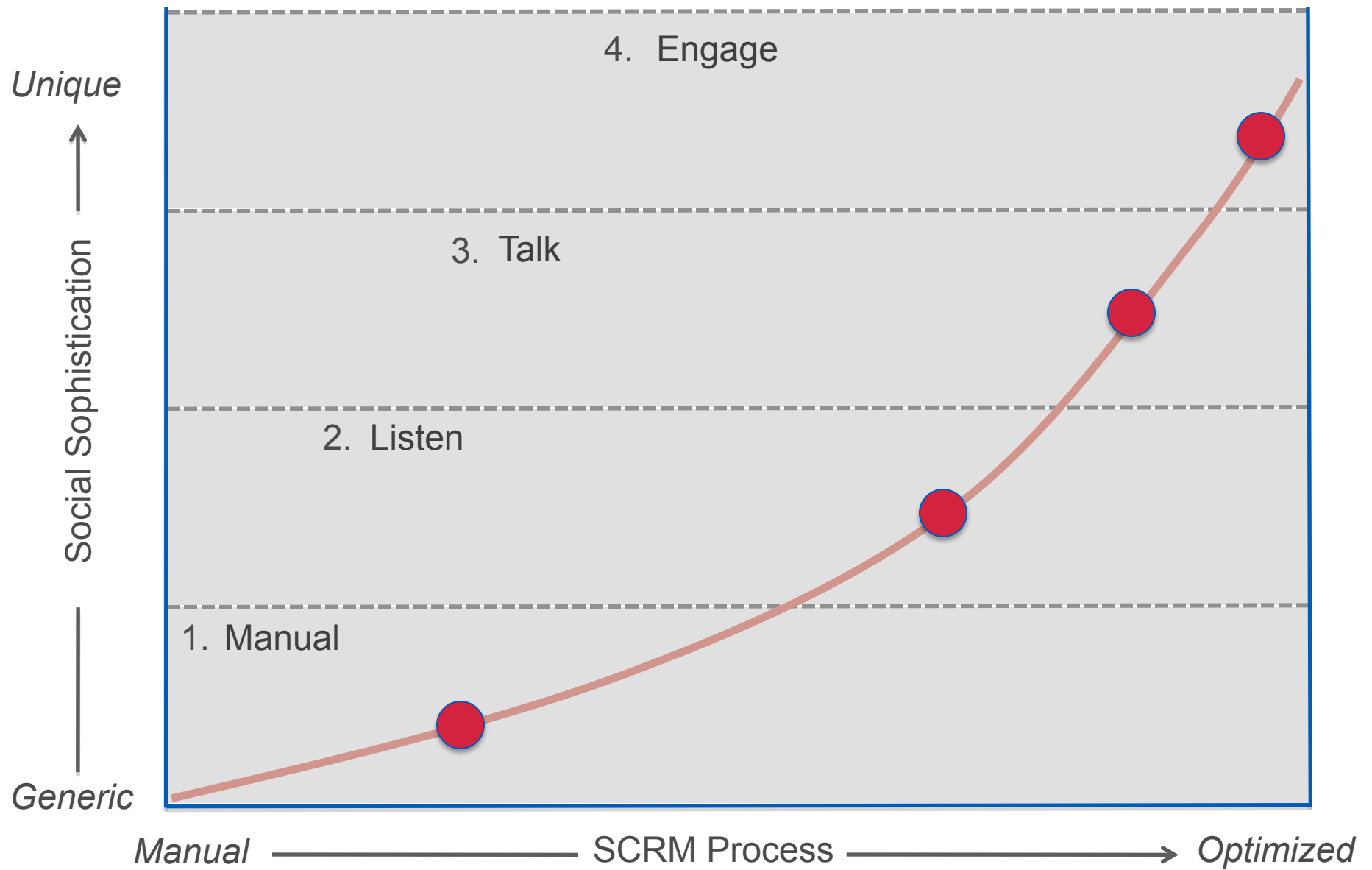
Social CRM Adoption Curve



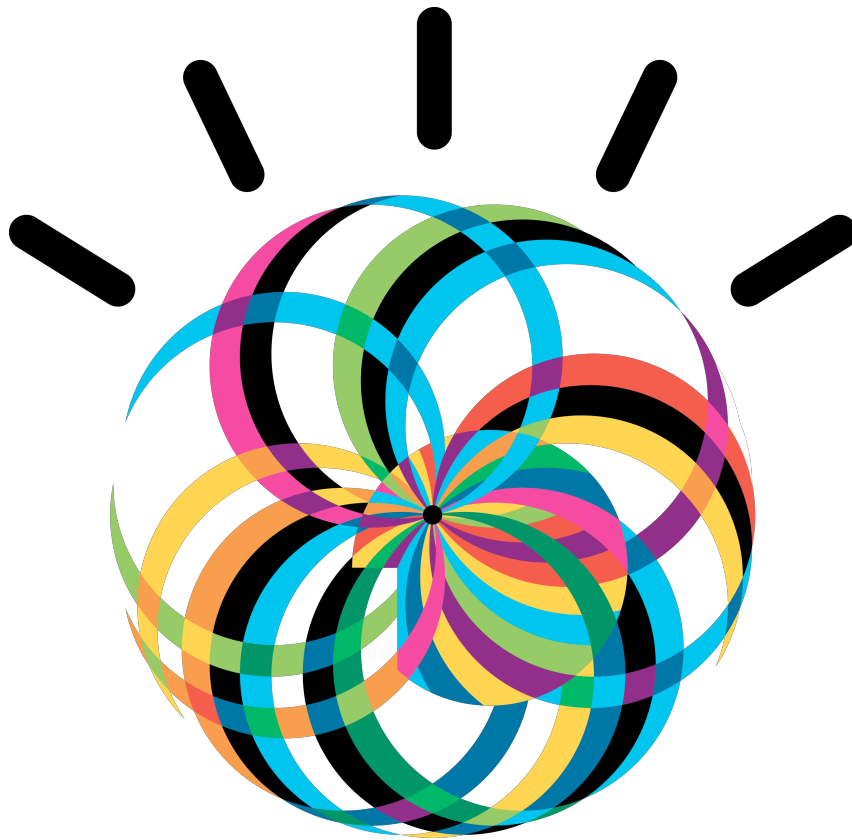
Social CRM Adoption Curve



Key to Social CRM is Following the Curve



Sugar and IBM Social Media Integration



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

Overview



#IBMSocialBiz #sugarcrm

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- A Day in the Life of the Social Business

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SUGARCRM.





#IBMSocialBiz #sugarcrm

Best Practices for Becoming a Social Business

Kyle Farnand,
Executive Social Business and Cloud Consultant
IBM Collaboration Solutions

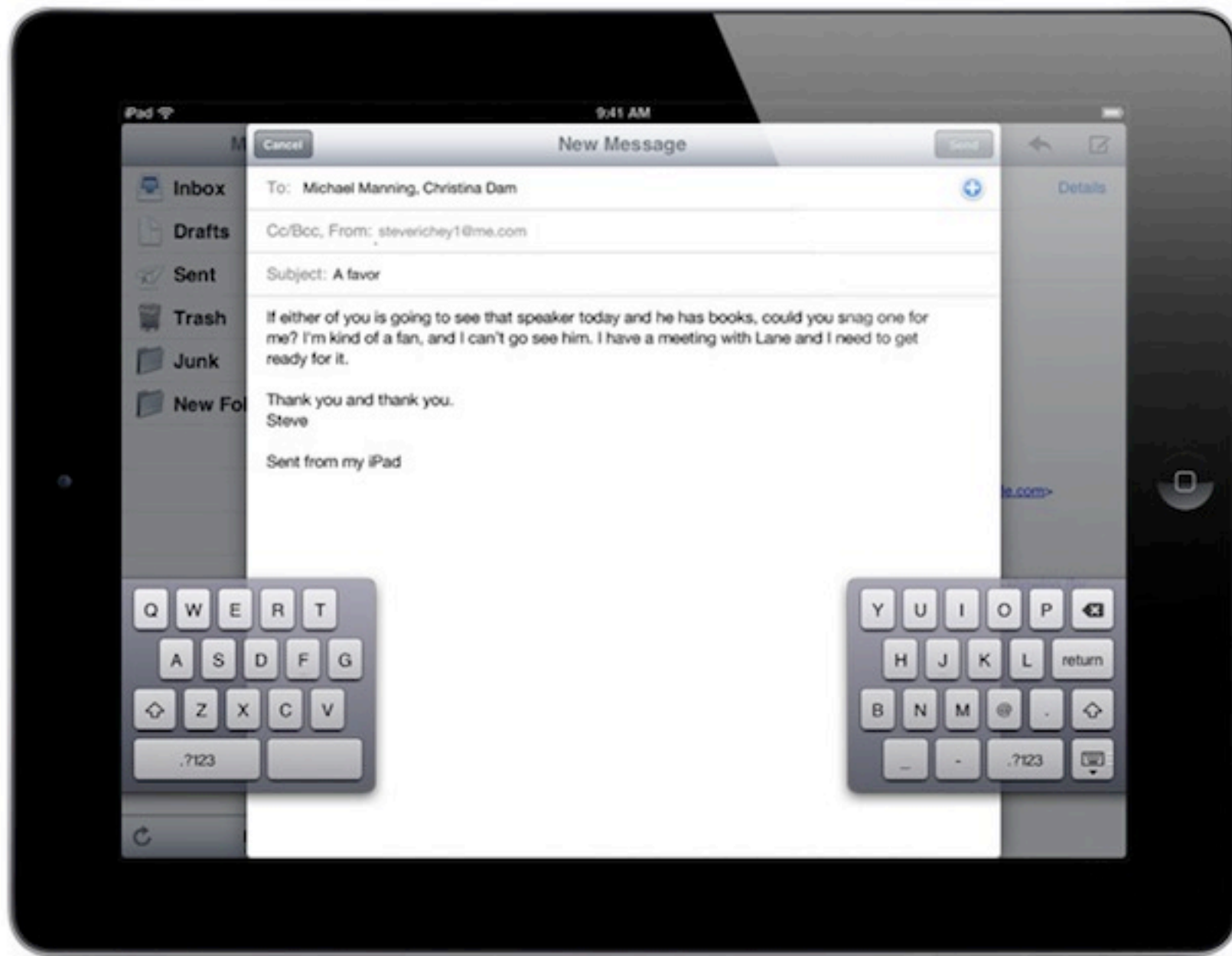


Social is Generational, Geography & Cultural





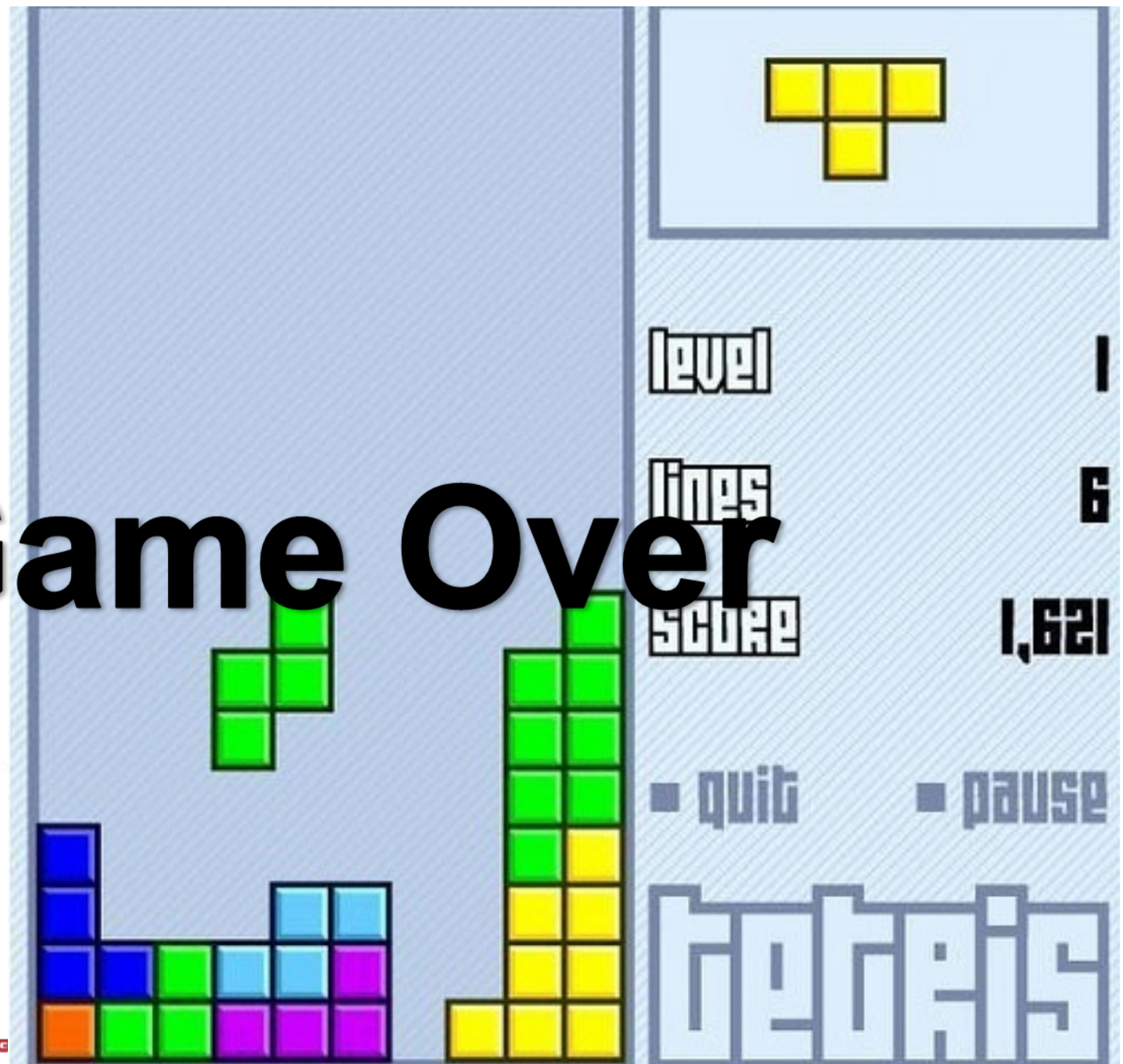
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Too Much
Mail = "Tetris
Mail"



Game Over



Customer Info - IBM Lotus Notes

File Edit View Create Actions Attachment Tools Window Help

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

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

New Reply Forward Display More

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

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

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

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

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

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

CBF It Strategy - Product Area Capability Definitions v9 (version 1).tr.xls 2006-12-26_Institutional_SISP.pdf TCREF_FutureVisionValueChains-27Sep05-v2.ppt

WorldWide Sales Forecast.otp Biweekly time sheet1.xls budget_2.xls business controls.ods january.doc Marketing budget plan1.ods marketing_06.ppt

press_release.docx Sales Status Meeting Report.odt Subprime Mortgage Data.xls

Online

New Message - IBM Lotus Notes

File Edit View Create Actions Text Tools Window Help


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

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

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

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

THANKS

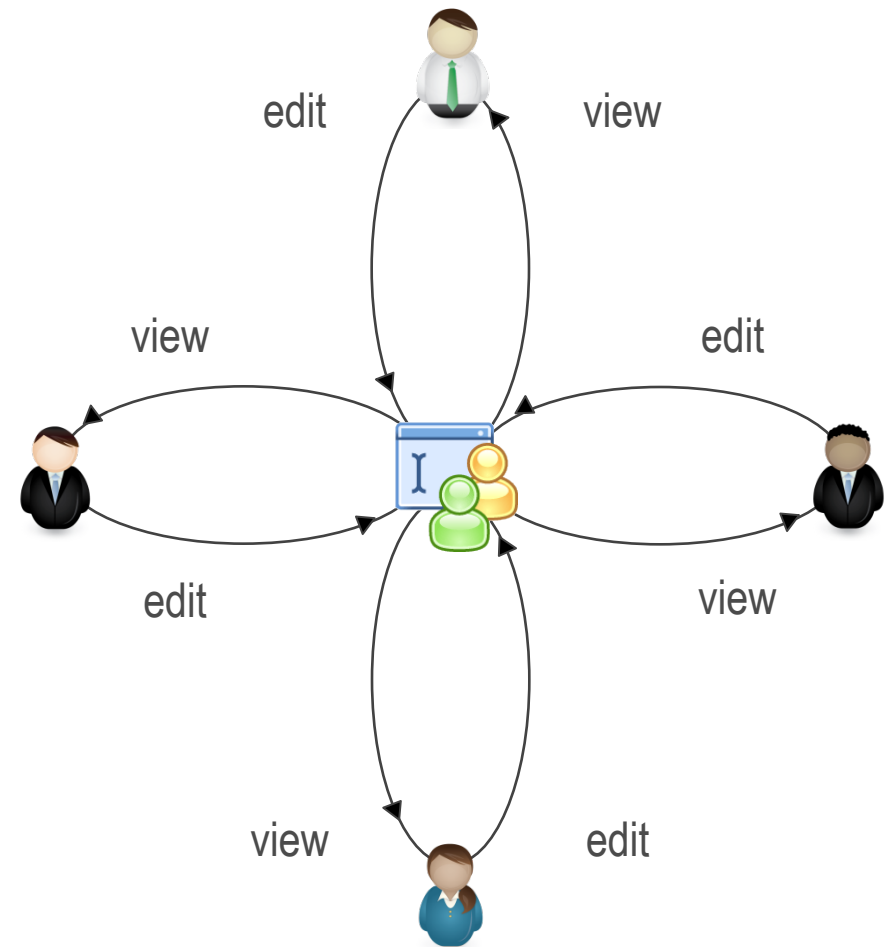
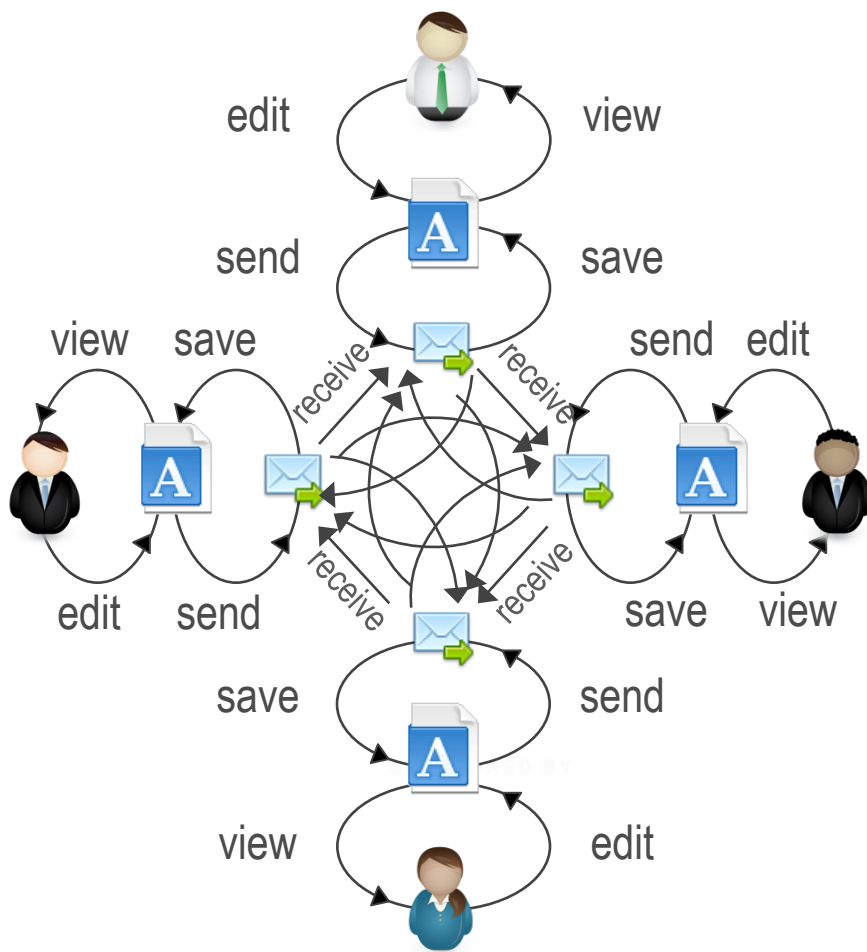
Frank Adams
Renovations
617.693.0440 (phone) | 617.320.1672 (cell)

www.renovations.com

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

Body of message

Online

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




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

Social Collaboration

Public Wikis | My Wikis

North America GSR



▼ North America GSR

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

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

Speaker Schedule

Updated May 18 by [Leon Cruywagen](#) | Tags: [get_social_road](#)

[Edit](#) [Page Actions](#) ▼

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

Speaker Schedule : Versions

Versions(191)

1-10 of 191

1 |

- 191 May 18 [Leon Cruywagen](#) [View](#)
- 190 May 18 [Karen A. Krieger](#) [View](#) [Restore](#)
- 189 May 05 [HEATHER B. MOORE](#) [View](#) [Restore](#)
- 188 May 04 [Scott S. Souder](#) [View](#) [Restore](#)
- 187 May 03 [HEATHER B. MOORE](#) [View](#) [Restore](#)

Speaker Schedule

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

Social Networking & Microblogging

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



Micro-blogging: Asking for Help

Following
Initiatives

Knowledge
Accident

Custom
Widget

Asking for
Help
based on
Network

1 new invitation



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

My Links

BlueThx (BETA Widget)



Privacy: Pub

Give BlueThx now!

BlueThx received ▾

Nhlapo, P (Phumlani)

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

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

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

What are you working on right now?



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



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

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



Milcent, Pierre Friday 10:01 AM

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

[Write another comment...](#)



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



Quig, Robert (R.L.) Oct 1

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

[Write another comment...](#)



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



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

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

[Add comment](#)



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

Flatten Organization

▼ The Board

What are you working on right now?



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

(1 comment)



Suarez Rodriguez, Luis Today 3:21 AM

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

[Write another comment...](#)



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

(2 comments)



Wright, Stephen F. Sunday 5:34 PM

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



Hall, Matthew J. Sunday 7:28 PM

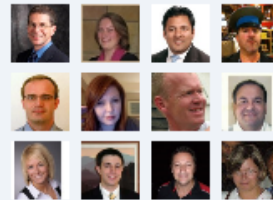
I, too, love the new W3 look-&-feel. Does the person search leverage Faces (<http://faces.tap.ibm.com/#>) technology? Hope the "Connect and Share" section becomes dynamic and updates automatically vs me having to hit the Ctrl+r key to refresh the page. Keep up the great work!

[Write another comment...](#)

[People managed](#)

Network

2 new invitations



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

My Links

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

[Blogs](#)

[Profile](#)

[Activities](#)

[Bookmarks](#)



[Communities](#)

[Wikis](#)

[Files](#)



Wright, Stephen (Steve) F.

BT/CIO Vice President, Enterprise Solutions and Web Enablement

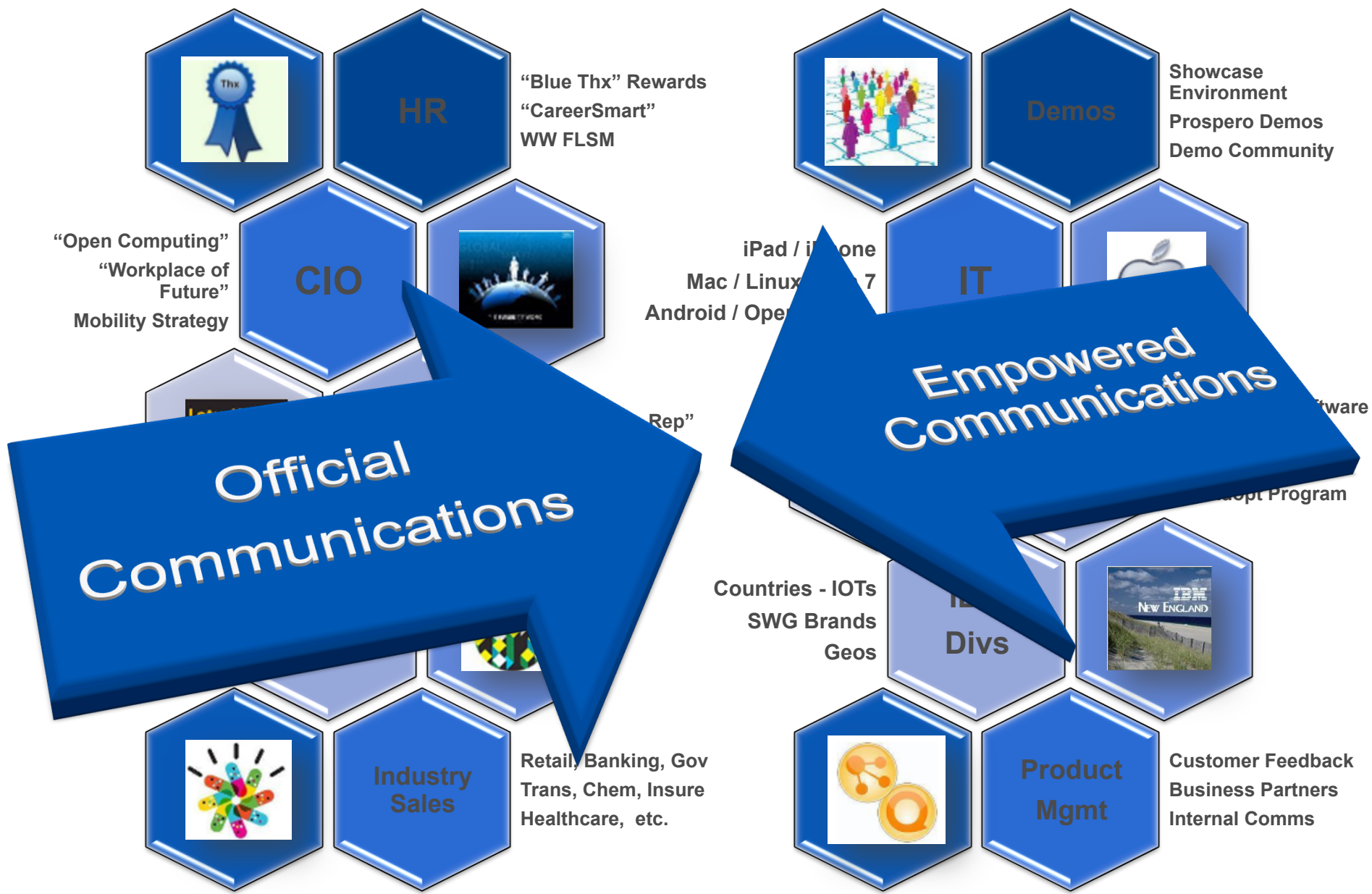
WESTFORD, MA United States

Building: WTF5 | Floor: 2 | Office: 2806

1-978-399-5045


swright@us.ibm.com

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




Human Resources


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




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



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



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



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



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

Human Resource Examples

Women in Europe



Women in Europe


Overview

Members

Wiki

Discussion Forum

Overview



GreatWomenCommunity

Welcome to Women in Europe

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

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


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

Reference Links:

IBM Great Women Community [wiki](#).

IBM Great Women Community [blog](#).

20K Members

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


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

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

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

☆ This file has not been recommended.

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



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

Size: 181 KB

[Download this file](#)



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

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

I've just been told I'm a part of a "resource action" at IBM. My tentative last scheduled day is May 31, although it could be as early as March 31. Unlike some people put into this situation I would very much like to stay at IBM. Therefore I am holding this event to help my in my job search. Please, if anyone's heard of a job opening in one of the following areas, let me know.

Information Technology
Education
Writing
Technical Support
Social Networking
Systems Analysis

I am also open to suggestions from those whom I've worked with. You all know I learn fast and well, am a good teammate, and have a very wide background so I can learn anything. I am willing to start at ground zero if necessary. I'm a self-starter; just point me in the right direction.

Also, it is possible some of you are part of this resource action. If so please accept my condolences as well as my offer of help, no strings attached. If I know your work I'll be a reference; I'll also send along any information I have about prospective jobs. If I lose a job to a friend who is better at it than I am I am happy to help; I don't believe in competition for this sort of thing. You are all welcome to any news I may have.



Patricia Rowell
1 Posts

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

May 24

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

[Reply](#)



NANCY GOULDER
1 Posts

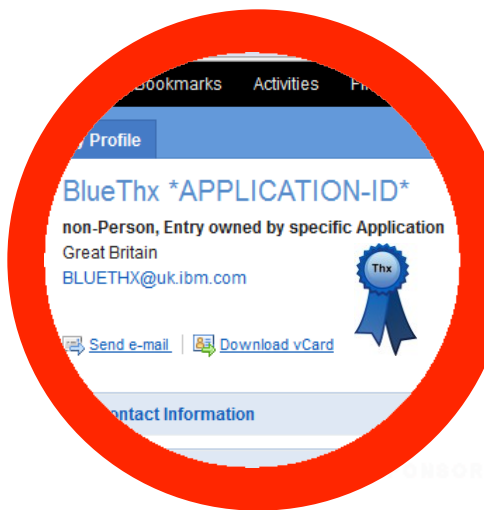
How do you promote a culture of innovation? Any management best practices to share?

Mar 31

[Reply](#)

BlueThx Initiative via Connections

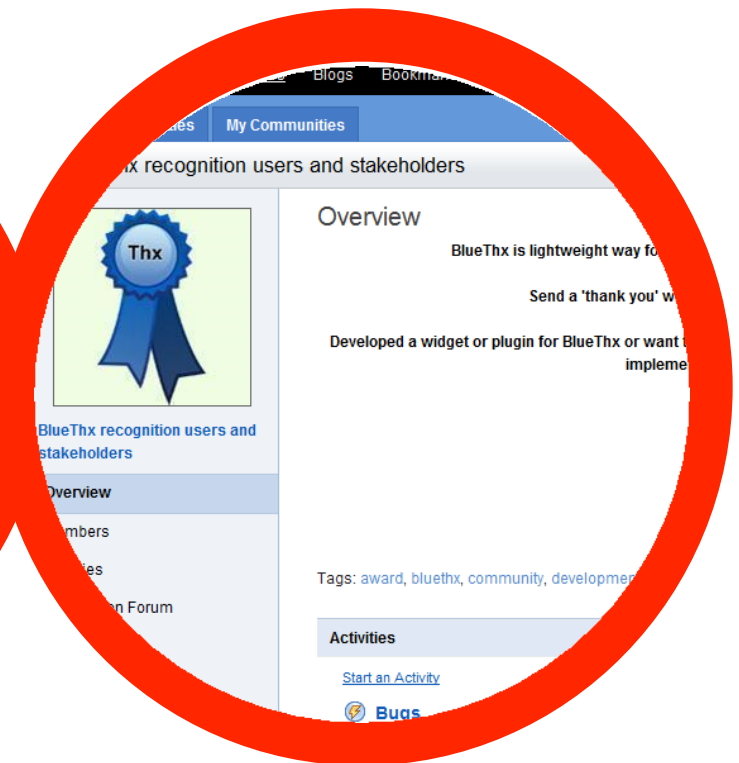
Initiative as a Person



Initiative as a Widget

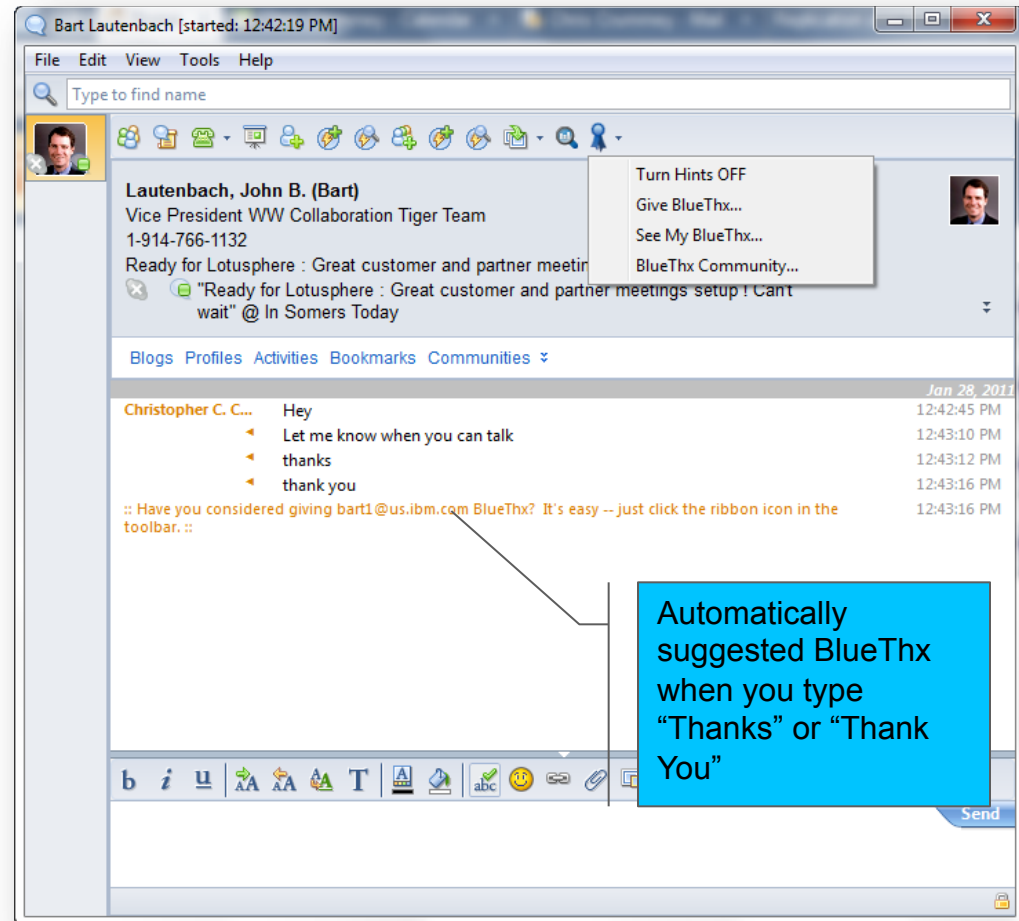


Initiative as a Community



BlueThx – Sametime

- Extensible Plug-in
- Easy to do the right thing
 - Automatically
 - Suggestions
 - Thanks
 - Thank You
 - Thx



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



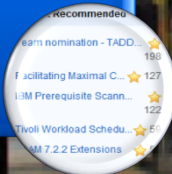
- Crowdsourcing
- Internal & External
- Prioritize features
- 3-4 months faster to market
- Technology Adoption Program

Innovation



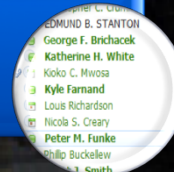
- Digital Reputation
- SME & Natural Champions
- 22K Blogs
- 179% adoption

Digital Reputation



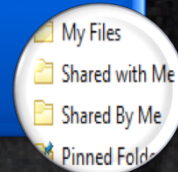
- Real Time Collaboration
- 50M IMs per day
- 2x every 3 years

Real Time



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

Wisdom of Crowds



Sugar and IBM: Summary



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

www.sugarcrm.com/ibm

Overview



#IBMSocialBiz #sugarcrm

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

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SUGARCRM.





#IBMSocialBiz #sugarcrm

A Day in the Life of a Social Business

Jan Sysmans

Senior Director Product Marketing

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

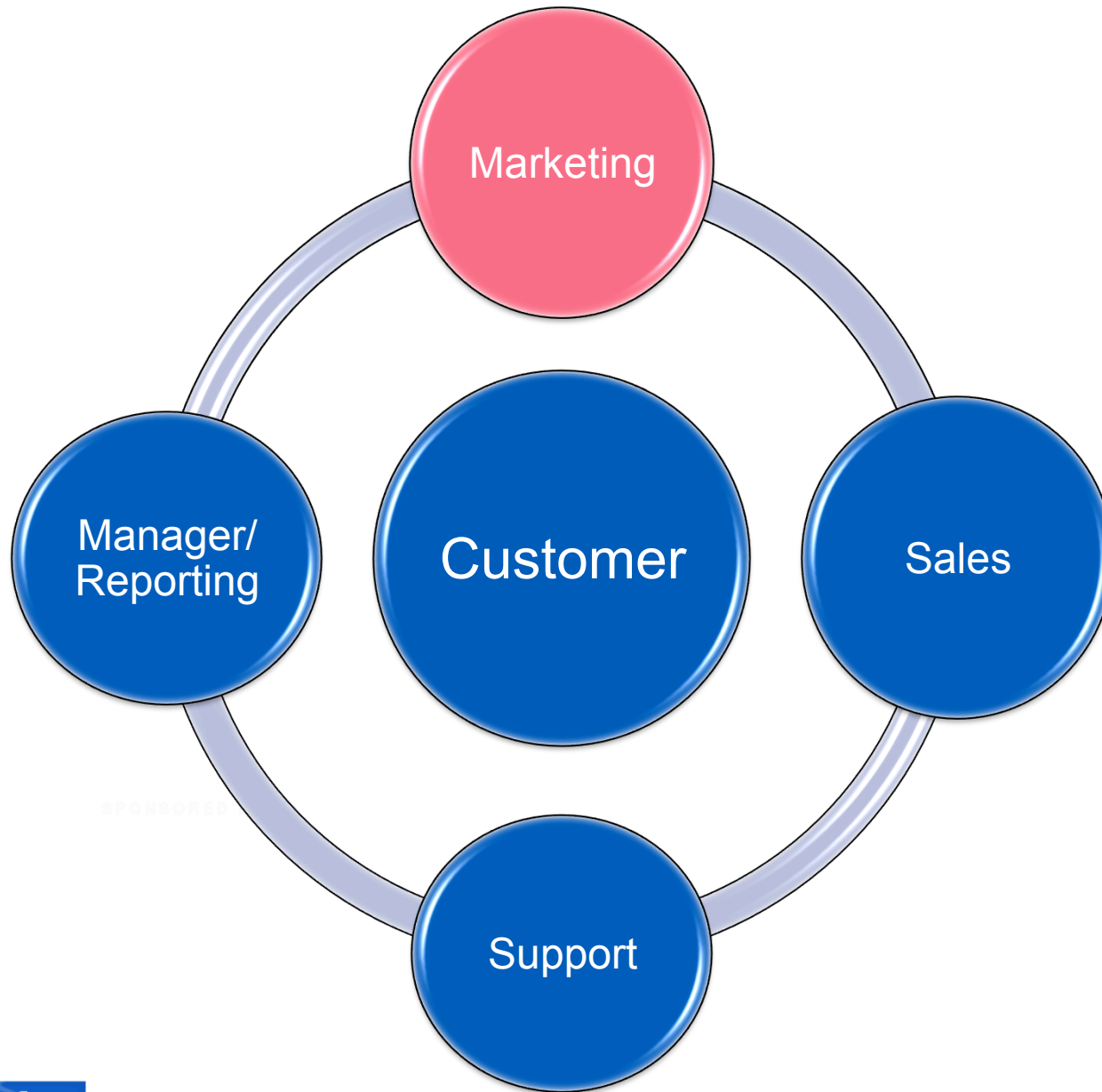
You will see Social CRM in Action:

- **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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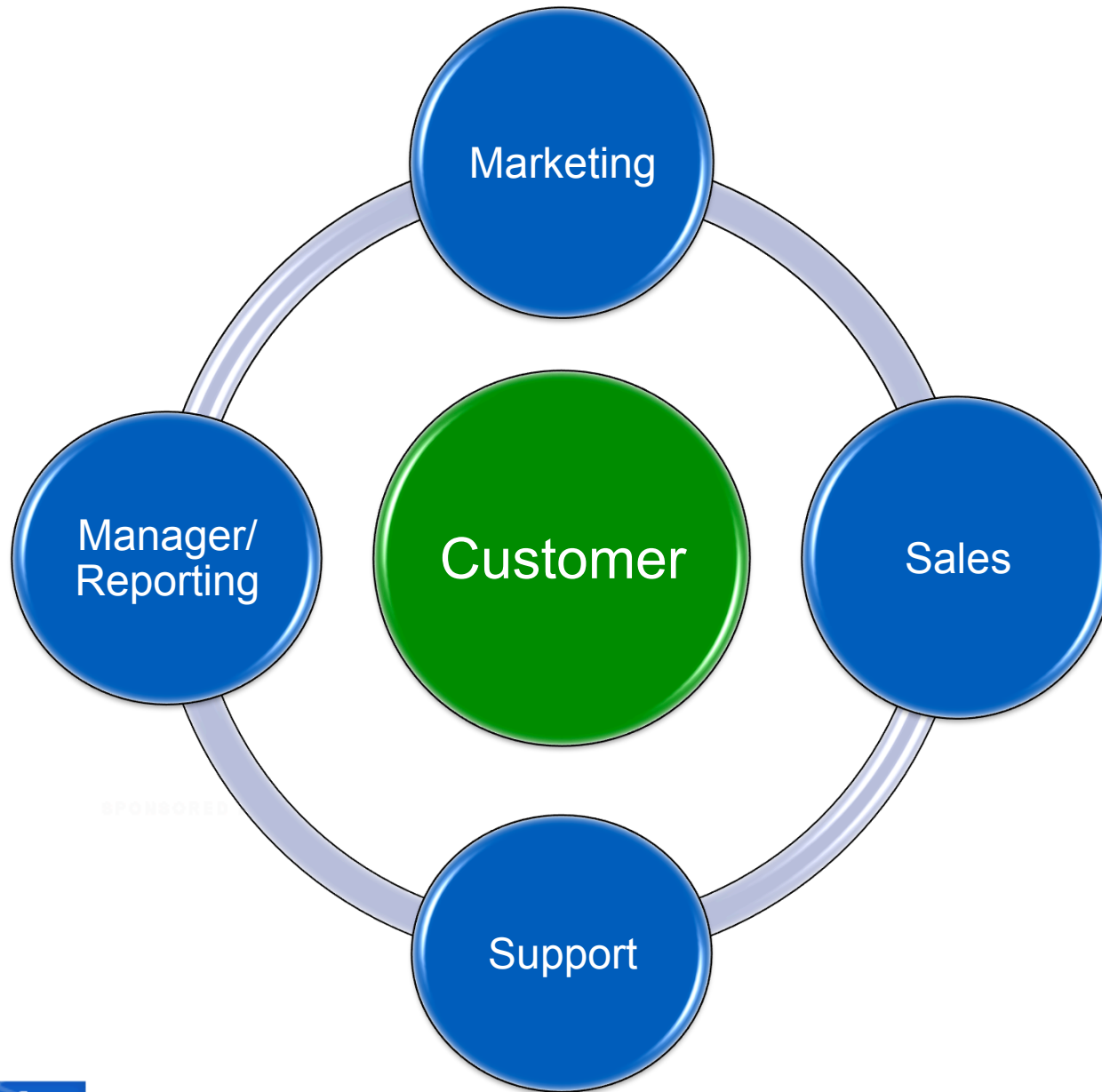


Marketing Creates a Campaign



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A Prospect Responds



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Sales Works the Lead



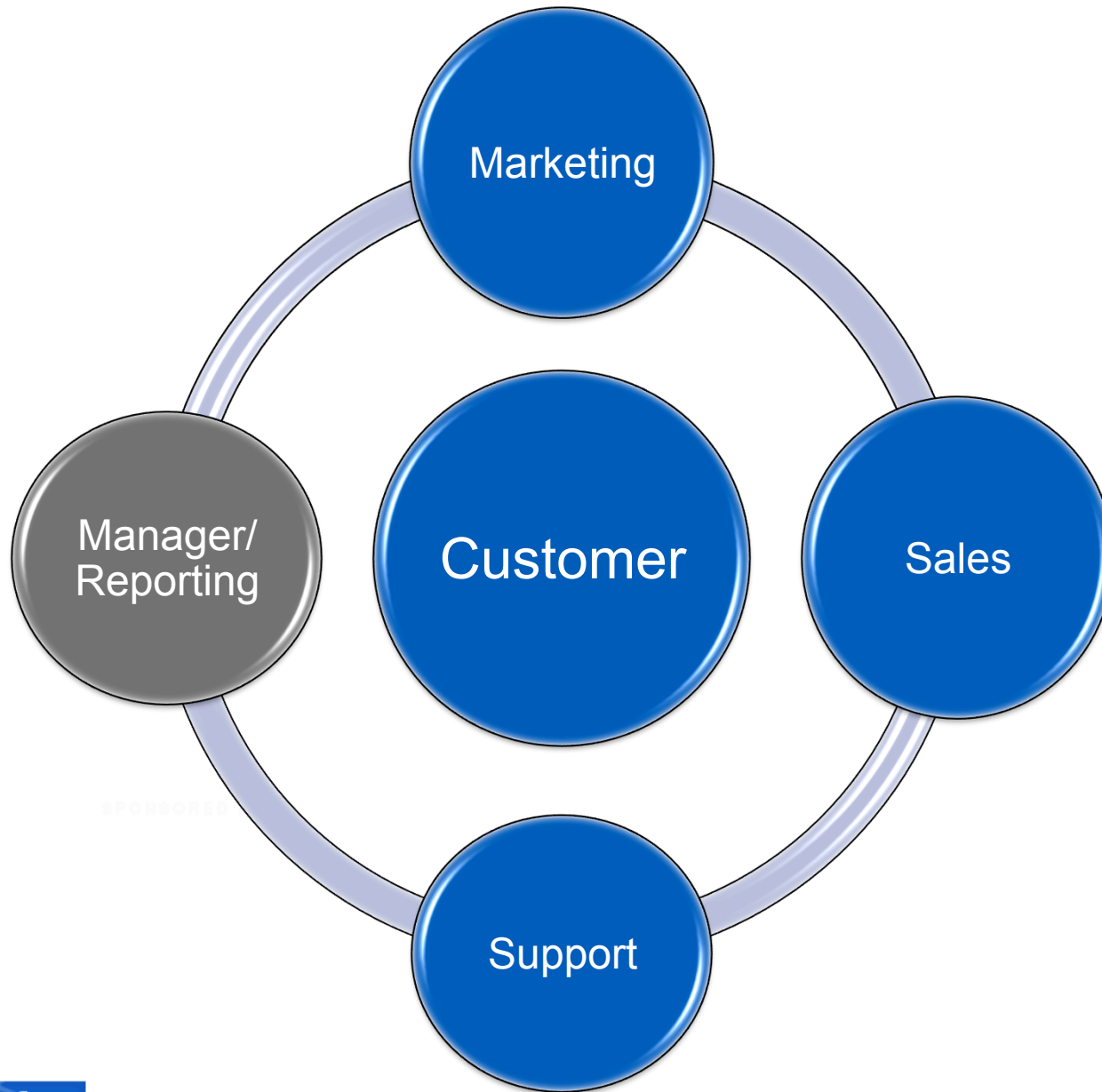
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Sales and the Prospect Interact Socially



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Management Views the Forecast



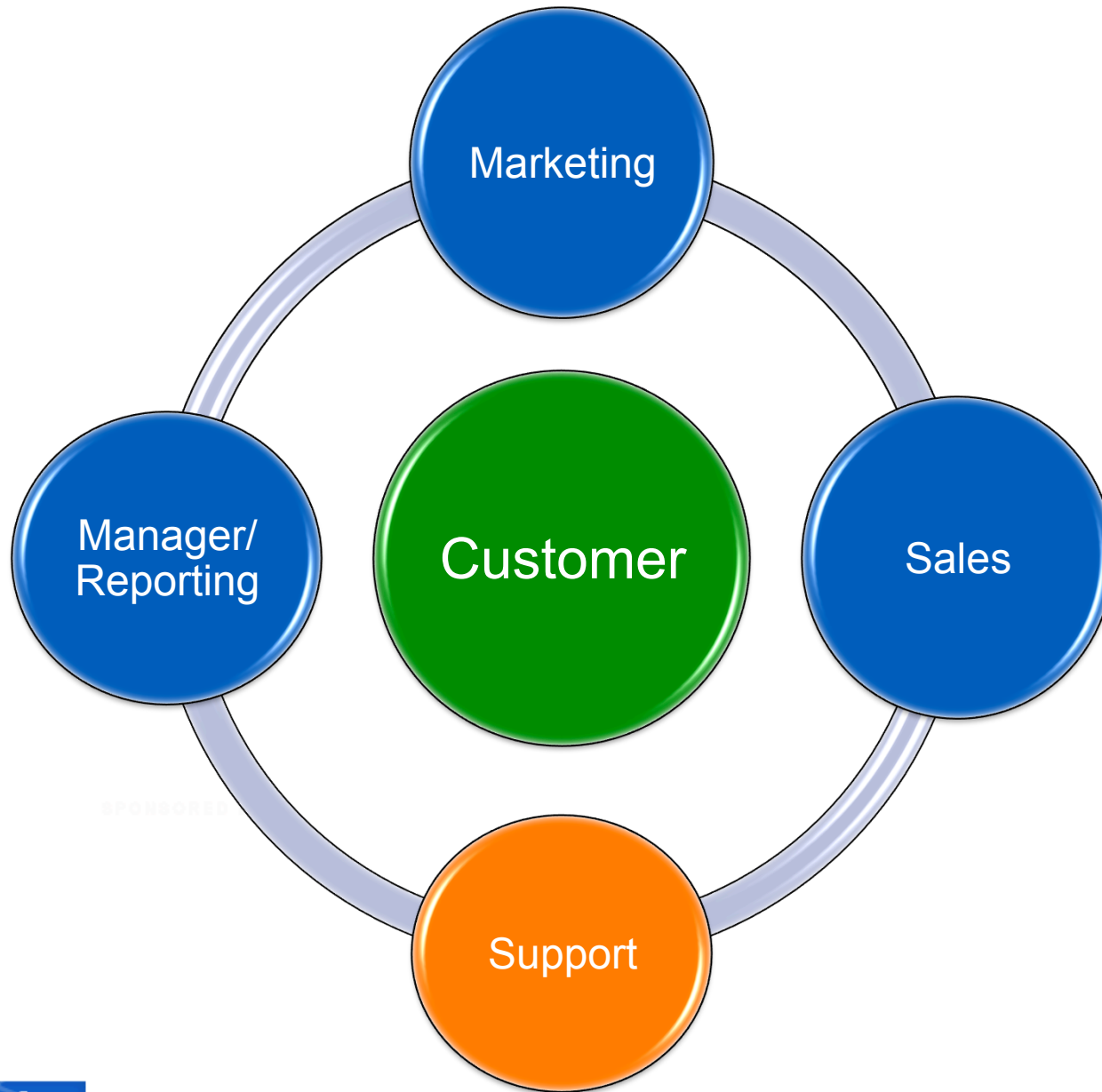
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Warm Handoff to Customer Support

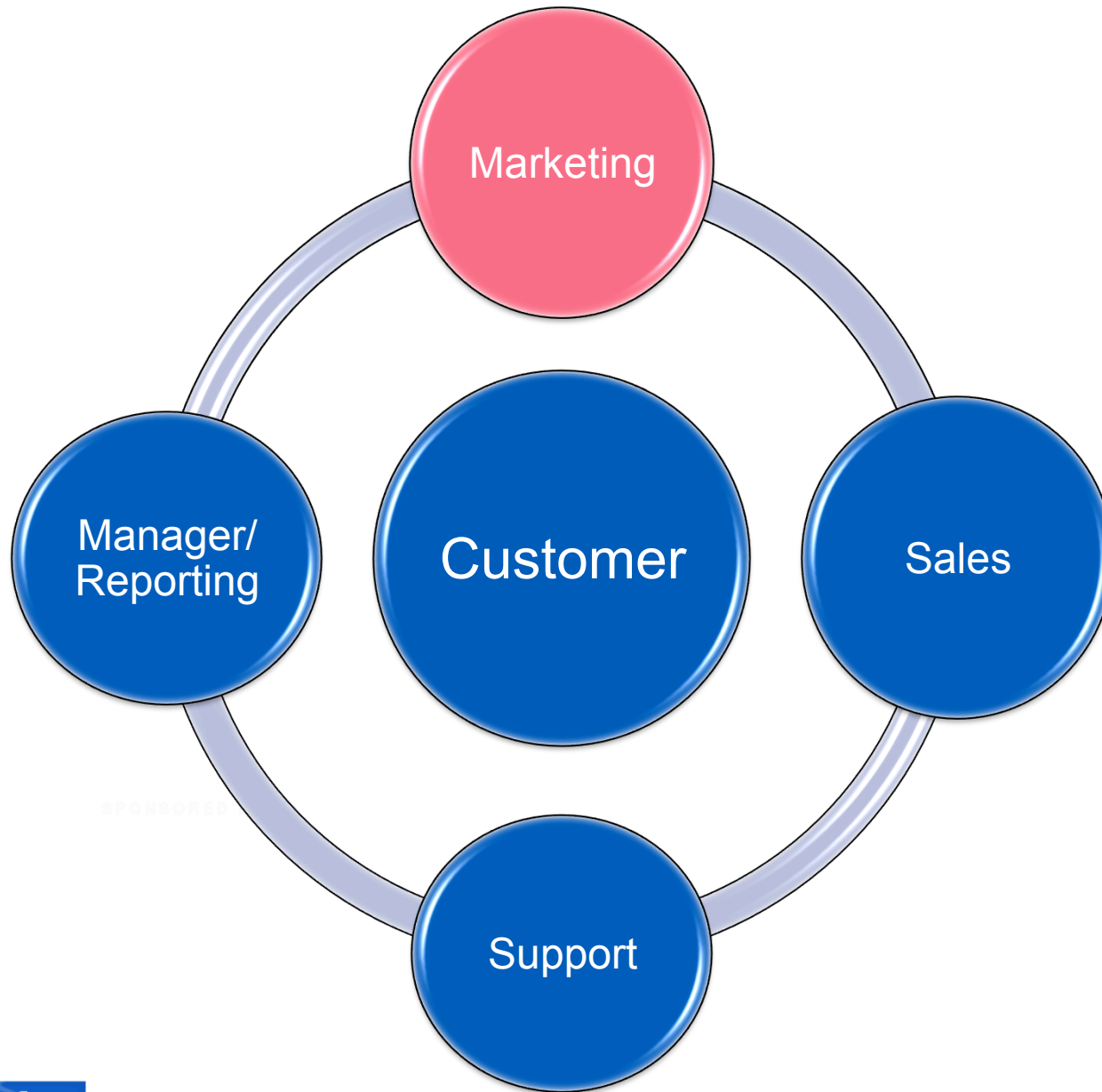


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The Customer Opens a Support Ticket



Marketing Reviews the Campaign's ROI



The Social Business

SugarCRM


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

Main Menu


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 - » SugarCRM
- » FAQ
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Resources


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




Jane Fitzpatrick
Campaigns Marketing



Will Westin
Account Manager



Regina Lazlow
Customer Service
Representative



Jim Brennan
VP Sales

The Customer



Allergy | Technology | Health Care Providers | Research | Patients

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



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

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



Tomi Fujimura,
Director Marketing
ImmuneTech

In This Demo, You Will Observe:

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



Jane Fitzpatrick, Marketing Manager

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

Social Media to Generate Leads

LinkedIn  Account Type: Basic

Home Profile Contacts Groups Jobs Inbox 3 Companies News More

Groups ▾



CRM Experts

Discussions

Members

Promotions

Jobs

Search

More...



Follow Chris

Mobilise your business or mobilose your business

Chris@velocityweb.co.uk



Mobile Research Conference 2011 London

mobileresearchconference.com

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

5 months ago

 Like

 Comment

 Follow

 Flag

More ▾

Welcome to

SUGAR ENTERPRISE.

Please enter your user name and password.

User Name:

Password:

Language:

English (US)



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

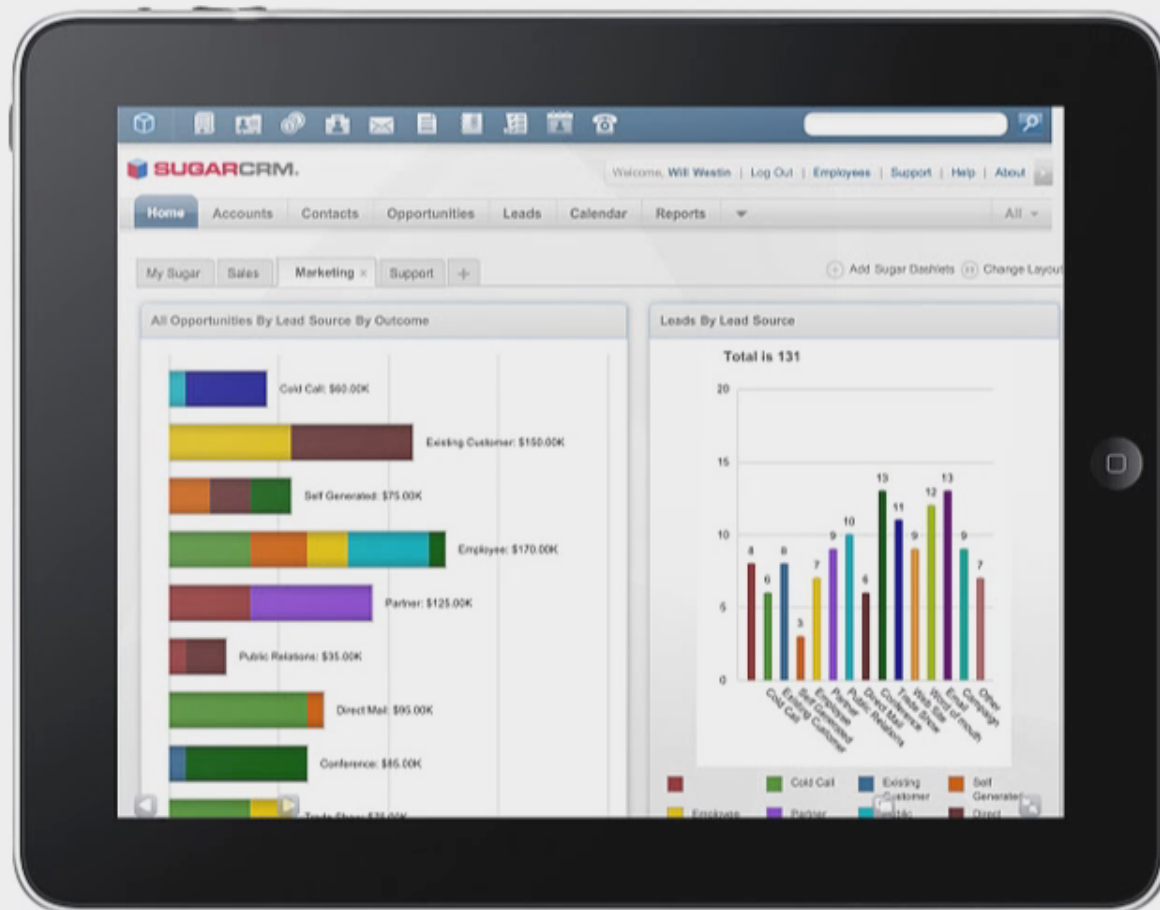
Mobile and Social

- 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:

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Server response time: 1.46 seconds.

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Regina Lazlow

Customer Service Representative

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

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Bienvenue sur
SUGAR ENTERPRISE.

Merci de vous authentifier.

Login:

Mot de passe:

Langue: ▼

Login

Temps de réponse du serveur: 0.21 secondes.

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Tomi Fujimura, ImmuneTech

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

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SugarCRM

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- » SugarCRM Help
- » OSM Home
- » Administrator

Welcome to SugarCRM

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User Name:

Password:

[New user? Please register](#)

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SUGARCRM

Customer Service in Sugar



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



Jane Fitzpatrick, Marketing Manager

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

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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

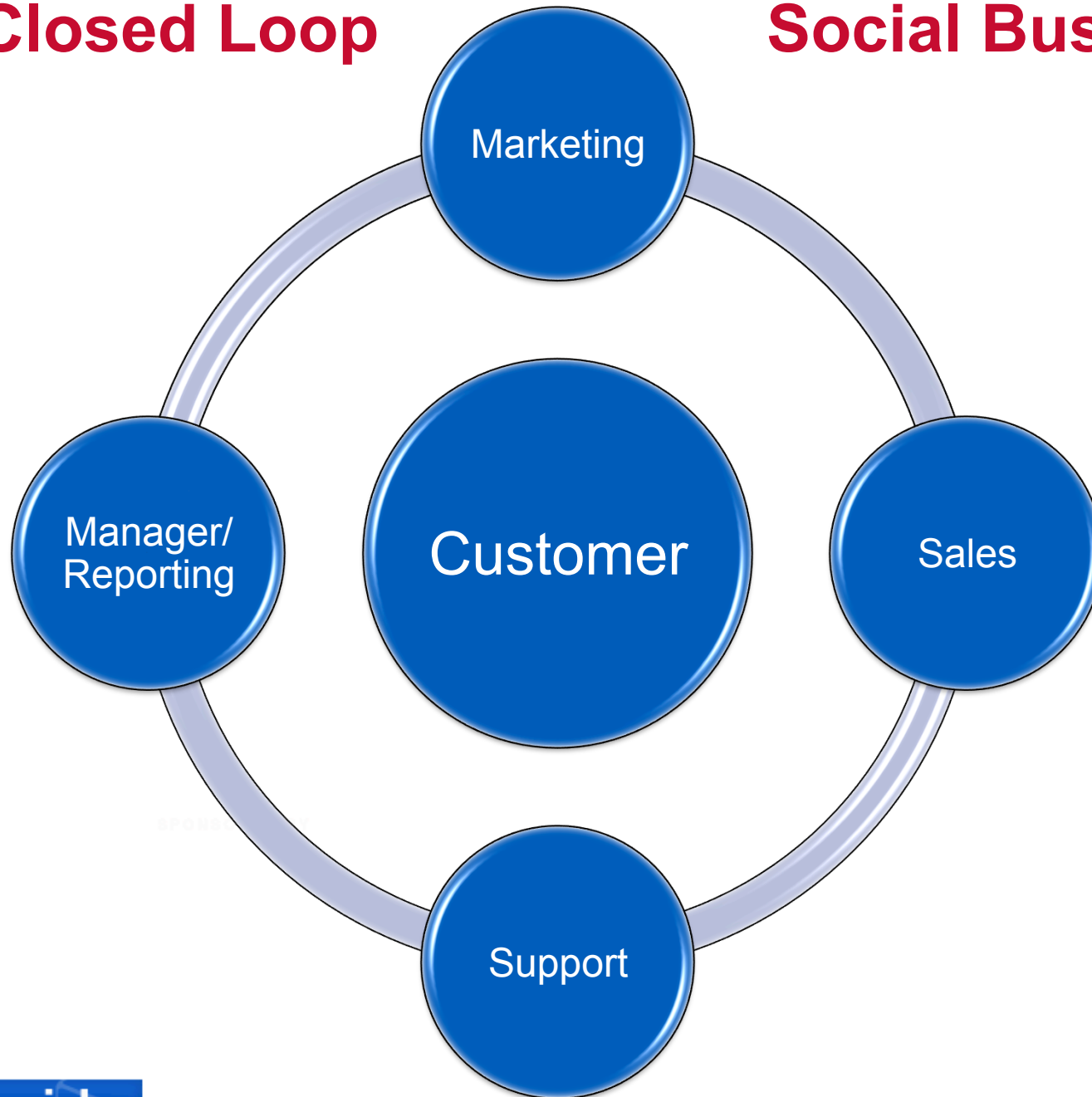
Create	Select	(1 - 3 of 3)	
Target List	Description	Type	Targets in List
Mobile Campaign New Lead List		Default	414 edit rem
Mobile CRM Lead Nurturing List		Default	159 edit rem
Opt-outs		Suppression List - By Id	7 edit rem

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

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Your Next Step: Join The Conversation



@IBMSocialBiz
@sugarcrm

Learn more and schedule a free trial: www.sugarcrm.com/ibm

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Questions and Answers

