

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

Social Business and Social CRM

Tom Schuster
General Manager

SugarCRM Europe, Middle East, Africa



SUGARCRM®



Social Business

GETTING STARTED

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

Customer Service \equiv Marketing = Sales



Start a Chat

Send an Email

Sales: 1-800-961-2888



COMPANY

MANAGED HOSTING

CLOUD HOSTING

EMAIL & APPS

CLOUD BUILDERS

Hosting Solutions

Why Rackspace

Partner Program

Information Center

Blog Community

Hosting Knowledge

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

Racker

Hosting
Solutions

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

Start With the Customer



Start with
the customer



Put the customer at the center



Customer Relationship Management

CRM is about **Customers**

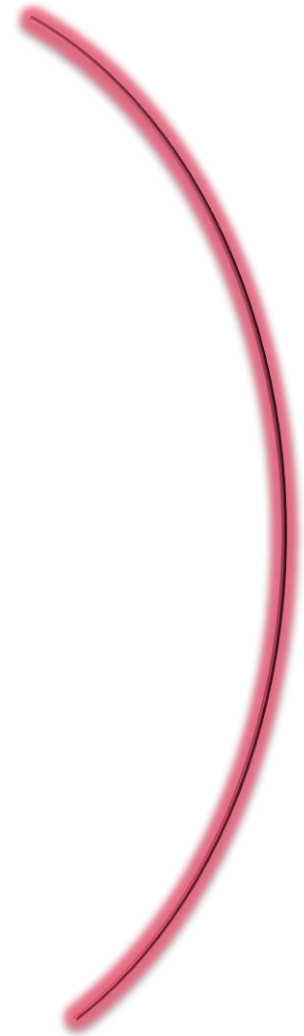
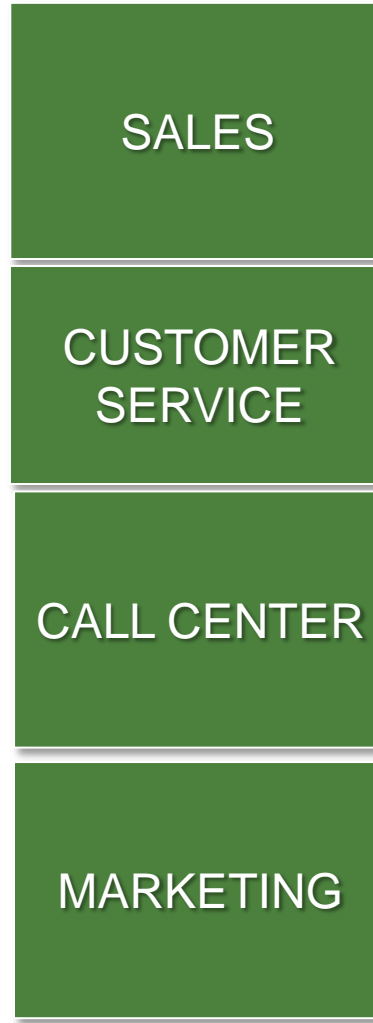
CRM is about **Acquiring, Retaining** and **Growing** Customers

Enable the sales edge

INNER CORE

SALES EDGE

CUSTOMERS

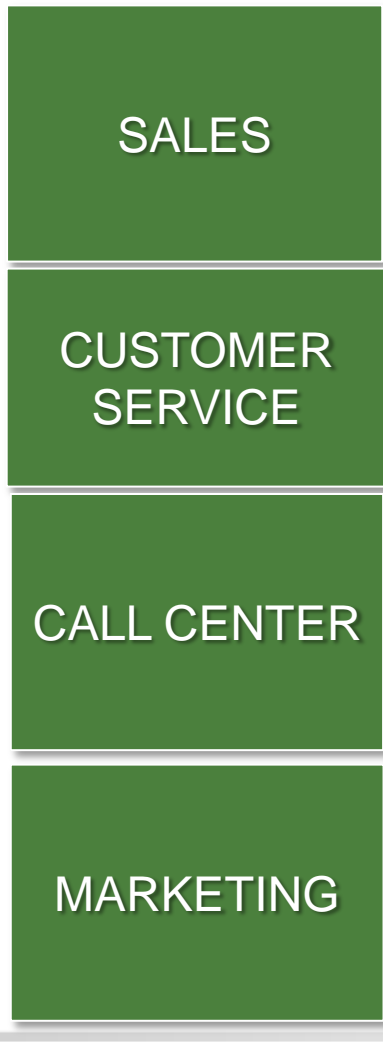


Introducing Social CRM



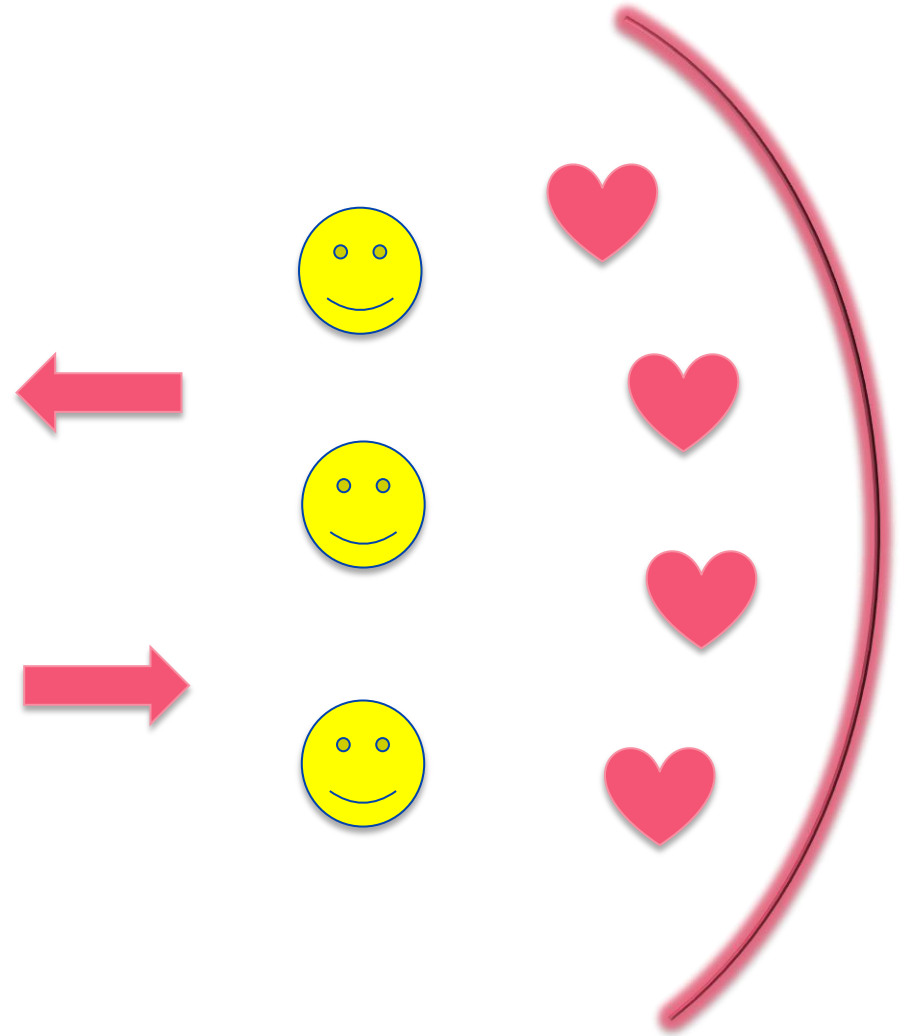
CRM Made Social: Enable the customer edge

SALES EDGE



PARTNERS

CUSTOMERS



Social CRM



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

©2010 CHESS MEDIA GROUP

CRM made Simple

CRM Made Simple

Social CRM

Intuitive

Open

Flexible

6 Steps to Getting started with Social CRM

Step 1: Implement an Open CRM System

Step 2: Customise the user interface and processes

Step 3: Integrate the essential back end systems

Step 4: Implement a flexible infrastructure

Step 5: Provide collaboration tools

Step 6: Use the Social Tools of choice

Getting started with Social CRM

Social CRM

Step 1: Implement an Open CRM System

Step 2: Customise the user interface and processes

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Step 4: Implement a flexible infrastructure

Step 5: Provide collaboration tools

Step 6: Use the Social Tools of choice

Open

Social CRM

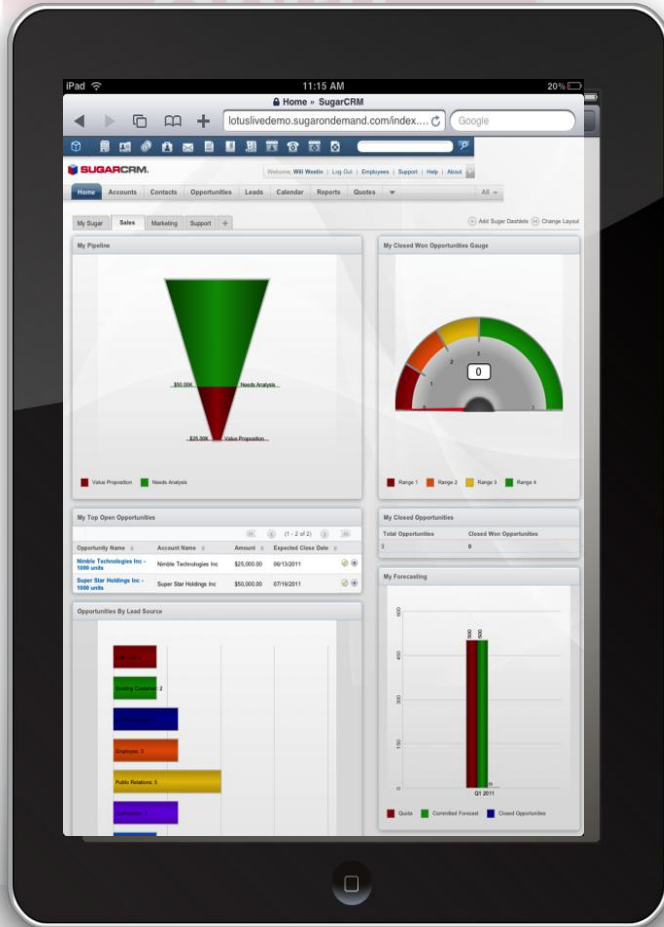
Technology

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

Community

- Hundreds of Extensions
- Qualified Partners

CS2



Getting started with Social CRM

Social CRM

Step 1: Implement an Open CRM System

Step 2: Customise the user interface and processes

Step 3: Integrate the essential back end systems

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Step 6: Use the Social Tools of choice

Intuitive

Social CRM



For Users

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

For Administrators

- Simple Customisation
- Seamless Upgrades

Getting started with Social CRM

Step 1: Implement an Open CRM System

Step 2: Customise the user interface and processes

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Step 6: Use the Social Tools of choice

360 Degree View of the Customer

CRM Activities

- Customer Support
- Marketing
- Sales

External data sources

- ERP
- Market Data
- HR

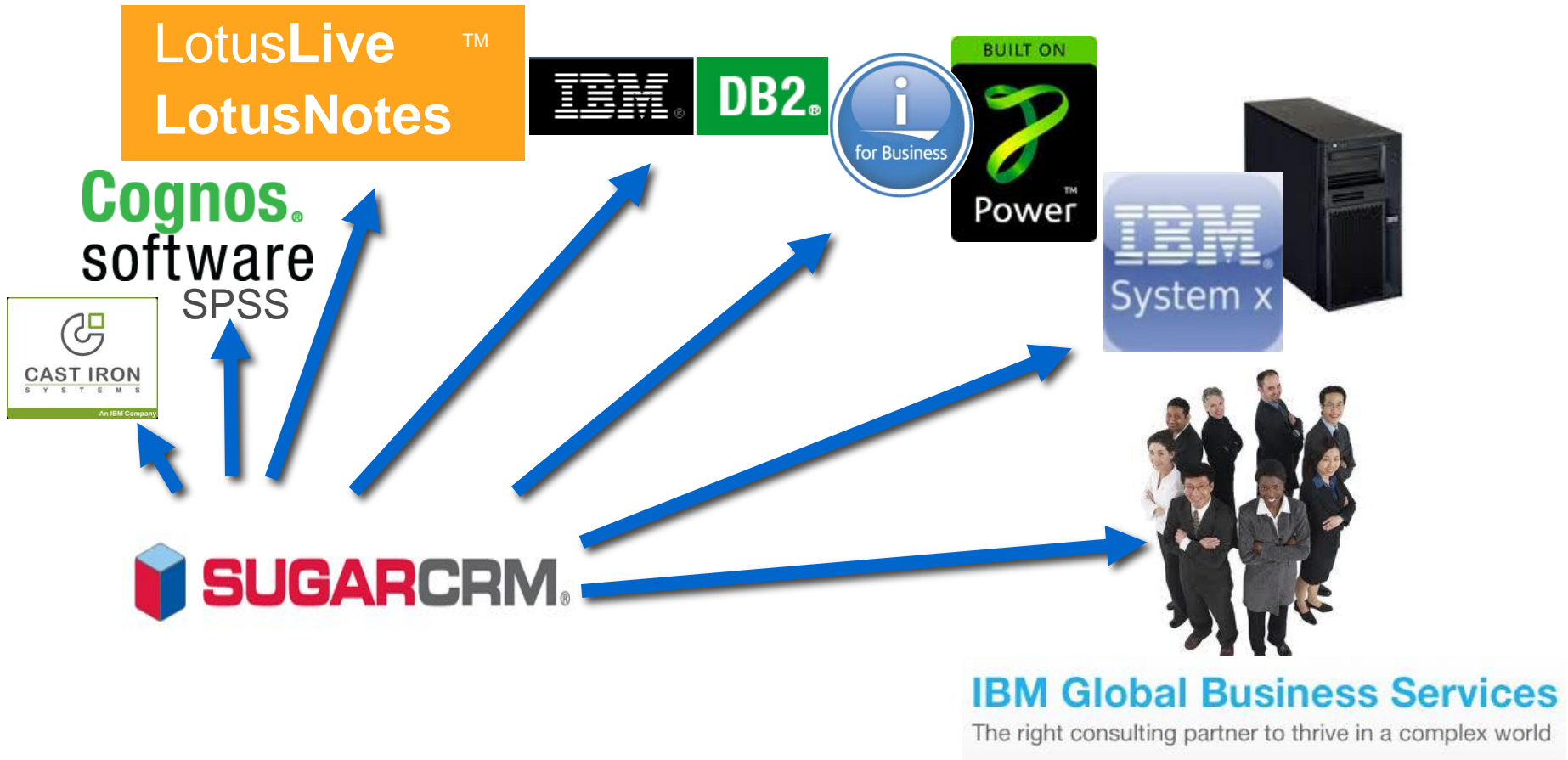


Specialised Tools

- Web Analysis
- Business Intelligence



IBM and SugarCRM: integrated offerings



Getting started with Social CRM

Step 1: Implement an Open CRM System

Step 2: Customise the user interface and processes

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SugarCRM: CLOUD 2.0 Run Anywhere

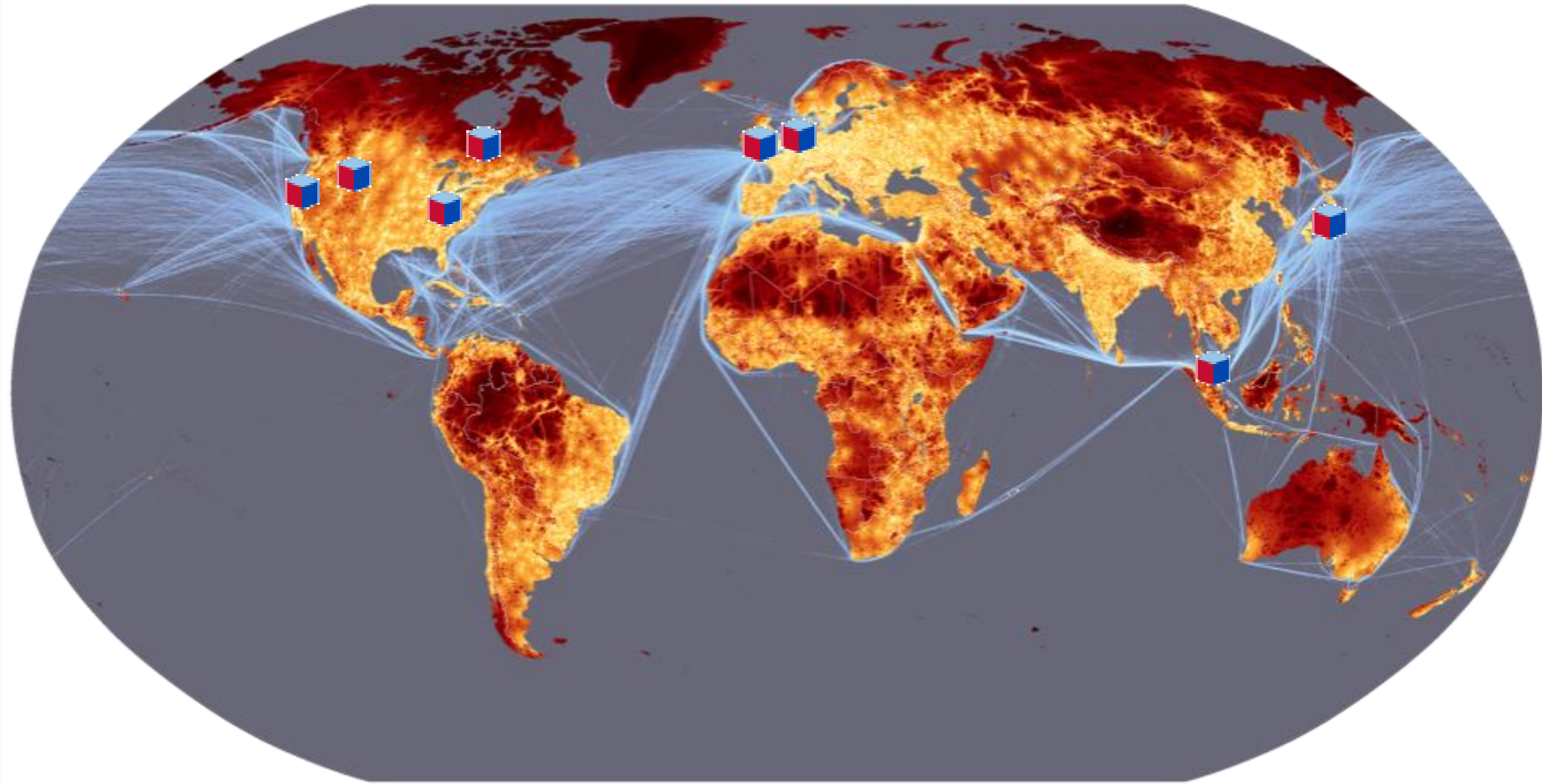


RUN ANYWHERE

- Any Device
- Any Platform
- Any Cloud

Expands SugarCRM's Global Reach

Sugar On-Demand + Sugar on IBM SmartCloud Enterprise



Getting started with Social CRM

Social CRM

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Step 5: Provide collaboration tools



Collaboration

Conferencing

Getting started with Social CRM

Social CRM

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Twitter Feeds on Your Dashboard

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

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

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

Home Accounts Contacts Opportunities Leads Calendar Reports Quotes All

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

My Twitter Feed

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

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

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

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

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

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

My Calls

(1 - 5 of 50)

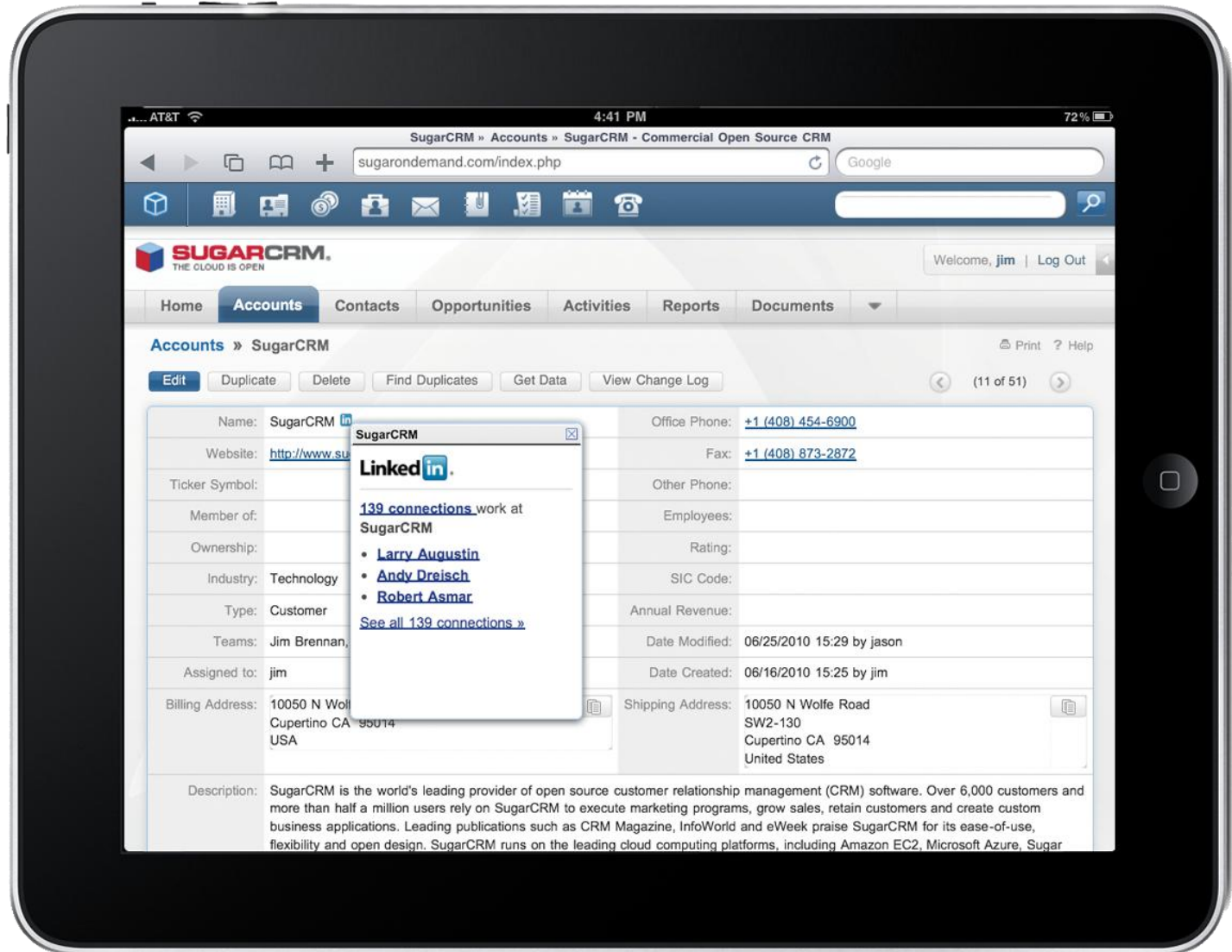
Close	Subject	Related to	Start Date	Status	Accept?
x	Left a message	X-Sell Holdings	11/07/2011 05:45am	Planned	
x	Bad time, will call back	Union Bank	10/03/2011 12:15am	Planned	
x	Left a message	Complete Holding	03/20/2011 11:30am	Planned	
x	Discuss review process	Bay Funding Co	03/05/2012 08:30am	Planned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

My Meetings

(1 - 5 of 66)



LinkedIn Accounts



SugarCRM » Accounts » SugarCRM – Commercial Open Source CRM

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

SugarCRM » Accounts » SugarCRM...

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

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

» SugarCRM

Edit Duplicate Delete Find Duplicates Get Data View Change Log

Basic Location

Google Map: [Web](#) [Images](#) [Videos](#) [Maps](#) [News](#) [Shopping](#) [Gmail](#) [more](#) | jsysmans@gmail.com | [My Profile](#) | [New!](#) | [My Account](#) | [Help](#) | [Sign out](#)

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

Print Send Link

Map Satellite Earth

Stevens Creek Blvd

Amherst Dr

Denison Ave

Wheaton Dr

Portal Plaza Shopping Center

Joann's

Yogurtland

Elephant

Creek Blvd

McLaren Pl

Rieder Pl

N Wolfe Rd

Perimeter Rd

Forbes Mill Steakhouse

AMC Theatres

Vallco Fashion Park

Benihana

JC Penney Portrait Studio

Square Shopping Center

Vallco Pkwy

N Tantau Ave

Junipero Serra Fw

Woodcrest

Ihop

Jenny Strand Park

Traffic More...

Done

Question:

What is the Social CRM interface of the future?

Answer:

The **social networking** site of choice

combined with

An **open** CRM system




Hillel Uses Social CRM to Connect with College Students

facebook


18

Search

Steve Kaz Home



Hillel: The Foundation for Jewish Campus Life




REACH
Relationship Management


REACH Login


Username:


Password:


Login




Steve Kaz is using REACH. about a minute ago


Alex Martinowsky used CPI ACC Championship Giveaway. 8 hours ago


Michelle Yeager used Game Gift Finder. 11 hours ago

Laura Ruff used Your Perfect Plate Quiz. 15 hours ago

Steve Kaz used REACH Training. 16 hours ago

Sponsored Story See All

Rob Gustafson used Are YOU Interested?

Are YOU Interested?
Use

Add additional fields before saving to Sugar

facebook

Search



Hillel: The Foundation for Jewish Campus Life

REACH

Relationship Management

My Contacts

My Events

Logout of REACH

+ Add Friends

My Engagees



Eric Aarons



Dave Adam



Joan Arkins



Ethel Kasinetz



Stephen Kazman

Kathy Allen

Kathy Allen

Kristi Amdur

Lori Arce

Bruce Aronow

David Artman

EJ Asbury

Dan Ascher

Shane Aubrey

Craig Avena

Cari Aves

Susan Axon

Cara Baggett

Marcel Bakx

Deborah Baldwin

Richard Baldwin

Sue Balfus

Julie Bane

Amanda Barcus

Kimiko Barkley

Cara Barr

ew/Create Interactions

ew/Create Interactions

ew/Create Interactions


View/Create Interactions

View/Create Interactions

Enter Friend Details in Facebook

Enter Friend Details

+ Add Friends



Kathy Nikki Allen

First Name: *

Kathy

Last Name: *

Allen

Email Address:

kathy123@gmail.com

University:

South Harmon Institute c

Expected Graduation Year:

2011|

Continue

Cancel


Add People from Facebook to Sugar

facebook

18

Search

Q



Hillel: The Foundation for Jewish Campus Life

REACH
Relationship Management

My Contacts

My Events






Logout of REACH

Kathy Allen

▼

+ Add Friends

My Engagees

	Eric Aarons	View/Create Interactions
	Dave Adam	View/Create Interactions
	Joan Arkins	View/Create Interactions
	Ethel Kasinetz	View/Create Interactions
	Stephen Kazman	View/Create Interactions

Add Interactions in Sugar from Facebook

The screenshot displays the REACH Relationship Management interface, which is integrated with Facebook. The top navigation bar includes the Facebook logo, a search bar, and the user's name "Steve Kaz" with a "Home" link. The main header area features the "Hillel: The Foundation for Jewish Campus Life" logo and the "REACH Relationship Management" branding. Below this, there are tabs for "My Contacts" and "My Events".

The "My Engagees" section on the left lists several contacts, each with a profile picture and name: Eric Aarons, Dave Adam, Kathy Nikki Allen, Joan Arkins, Ethel Kasinetz, and Stephen Kazman. The contact "Stephen Kazman" is highlighted, and a modal window titled "Interaction Log" is open for him.

The "Interaction Log" modal window shows a list of interactions for Stephen Kazman. The first interaction is dated "2011-09-22" and is titled "Facebook Wall Post". The second interaction is also dated "2011-09-22" and is titled "Met at a bar". Below the list, there is a form for adding a new interaction. The form includes fields for "Interaction Type" (set to "Campus Group Activity"), "Status" (set to "Completed"), "Interaction Date" (set to "09/27/2011"), and "Subject". There is also a text area for "Type your interaction notes here." and a checkbox for "Make the note private". An "Add" button is located at the bottom right of the form.


The bottom of the interface shows the REACH Relationship Management logo and copyright information: "Copyright © 2010 Hillel: The Foundation for Jewish Campus Life". There is also a link to "Report/Contact this App" and a language selector set to "English (US)".

Match Event Attendees with Contacts in Sugar

facebook

18

Search



Hillel: The Foundation for Jewish Campus Life

REACH

Relationship Management

My Contacts

My Events

Logout of REACH

My Facebook Events (not in Reach)

31

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

Add

31

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



Add

My Reach Events Synched with Facebook

31

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

Contact Profile Page




Hillel: The Foundation for Jewish Campus Life
REACH
Relationship Management

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

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

» Kathy Allen



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

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

South Harmon Institute of Technology
123 Main Street
Anytown, OH 43211 USA
Hillels
Engagers (1)
Remove Me ++ Add Others Refresh
Lee Johnson
No Interactions
Interests
Edit Refresh
No Data
Immersive Experiences
Refresh
No Data

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

Write Comments to Facebook Wall from Sugar

The screenshot displays the SugarCRM interface with a top navigation bar including Home, People, Student Interactions, Events, Hillel, Universities, Reports, Expenses, and Tag Categories. The 'People' tab is active, showing a profile for Kathy Allen. The profile includes a photo, a 'facebook' link, and a list of engagement options (Profile, Wall Post, My Facebook Engagees). The profile details section shows fields for Gender, Birthdate, Jewish, Birthright Eligible, Class Of, Major, Dorm, Student ID, FERPA Hold, Other ID, and Primary Team. A 'Wall Post' dialog box is open, allowing a message to be written. The dialog box contains a text area for the message and a warning that the message will appear on the person's Facebook wall. The background shows a partial view of the Facebook wall for Kathy Allen, with a post from Lee Johnson visible.

Hillel: The Foundation for Jewish Campus Life
REACH
Relationship Management

Welcome, Lee Johnson

Home People Student Interactions Events Hillel Universities Reports Expenses Tag Categories

» Kathy Allen

STUDENT

Kathy Allen
kathy@test.net

Gender:
Birthdate:

Jewish: Yes
Birthright Eligible:

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

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

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

Hillels

Engagees (4) Interests Immersive Experiences

Wall Post


Message:

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

Cancel Save


4am by Lee

Link Existing Contacts to Facebook Friends


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

REACH
Relationship Management

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


 » handy manny ☆


No Photo Available


 **Link To Facebook**



facebook

My Facebook Engagees

 Пашка Семенкин

 Eric Seringo

 Ethel Kasinetz

  **Actions**

STUDENT **BOARD MEMBER**

handy manny


Gender:
Birthdate:

Jewish: Yes
Birthright Eligible:



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



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

Address:
Notes:
Date:

 **South Harmon Institute of Technology**
, Antigua

Hillels









Engagers (1)
 Remove Me ++ Add Others  Refresh

Interests
 Edit  Refresh

Type the names of Facebook friends

Link to Facebook Friend

Link to Facebook Friend

-  Steve Morris
-  Sara Silverstein
-  Steve Smeyne
-  Jennifer Ziev Stein
-  Steve Scott
-  Scott Sterling
-  Michele Gorenstein
-  Scott Gorenstein

Facebook Friend Request

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

 » **Rory Thayers** 



   **Actions**

STUDENT **INTERN**

Rory Thayers

charris@hillel.org

Gender: Female

Birthdate:

Title:

Other ID:

Primary Team: Hillel at South Harmon Institute of Technology

facebook

 Add as Friend

 Profile

[My Facebook Engagees](#)

Mobile Interactions

Hillel: The Foundation for Jewish Campus Life
REACH
Relationship Management

Select a module
Student Interactions ▼ Go

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. ...

Save Cancel

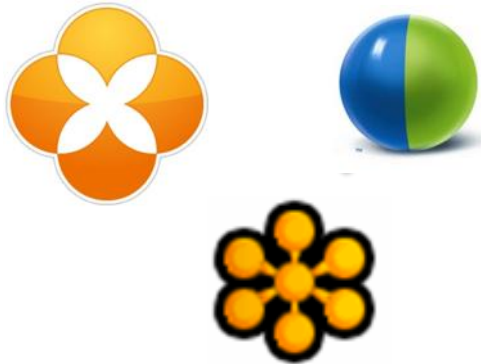
[Home](#) | [Back](#) | [Create Person](#) | [Log Out](#)

“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

Components of a Social CRM

Conferencing



Cloud



Collaboration



Community



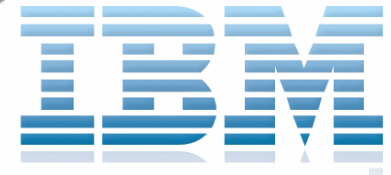
Social Business and social CRM

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

The Sweeter Road

Microsoft
Oracle
SFDC







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

Thank you

Tom Schuster
tschuster@sugarcrm.com



SUGARCRM®

