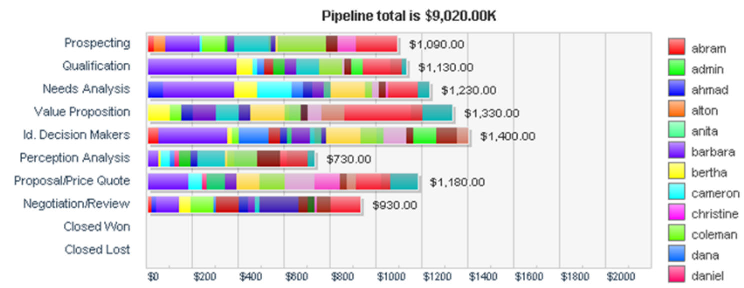
SugarCRM Sales Force Automation

June 6, 2011

Increase the Productivity of Your Sales Force



- Organize sales information into a single system
- Improve the productivity of sales individuals and teams
- Gain greater visibility into sales performance

SugarCRM Sales Force Automation

Issues	Solution	Impact
Sales reps do not use the CRM system	▪ Sales reps can choose the layout, data and appearance to meet their needs ▪ Short, customizable forms don't slow sales people down	**Higher user adoption leads to better data quality and performance**
Multiple systems treated as system of record	▪ Single view of accounts, opportunities, contacts, activities ▪ Sugar Plug-In for Outlook synchronizes information	**A single, integrated view of customer interactions**
Sales reps are mobile, information is not	▪ Offline Client Synchronization allows employees to continue to work offline ▪ Wireless device access lets reps work on-the-go	**Spend more time with customers and less time updating information**

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Why Sales People Use Sugar

Sales Reps

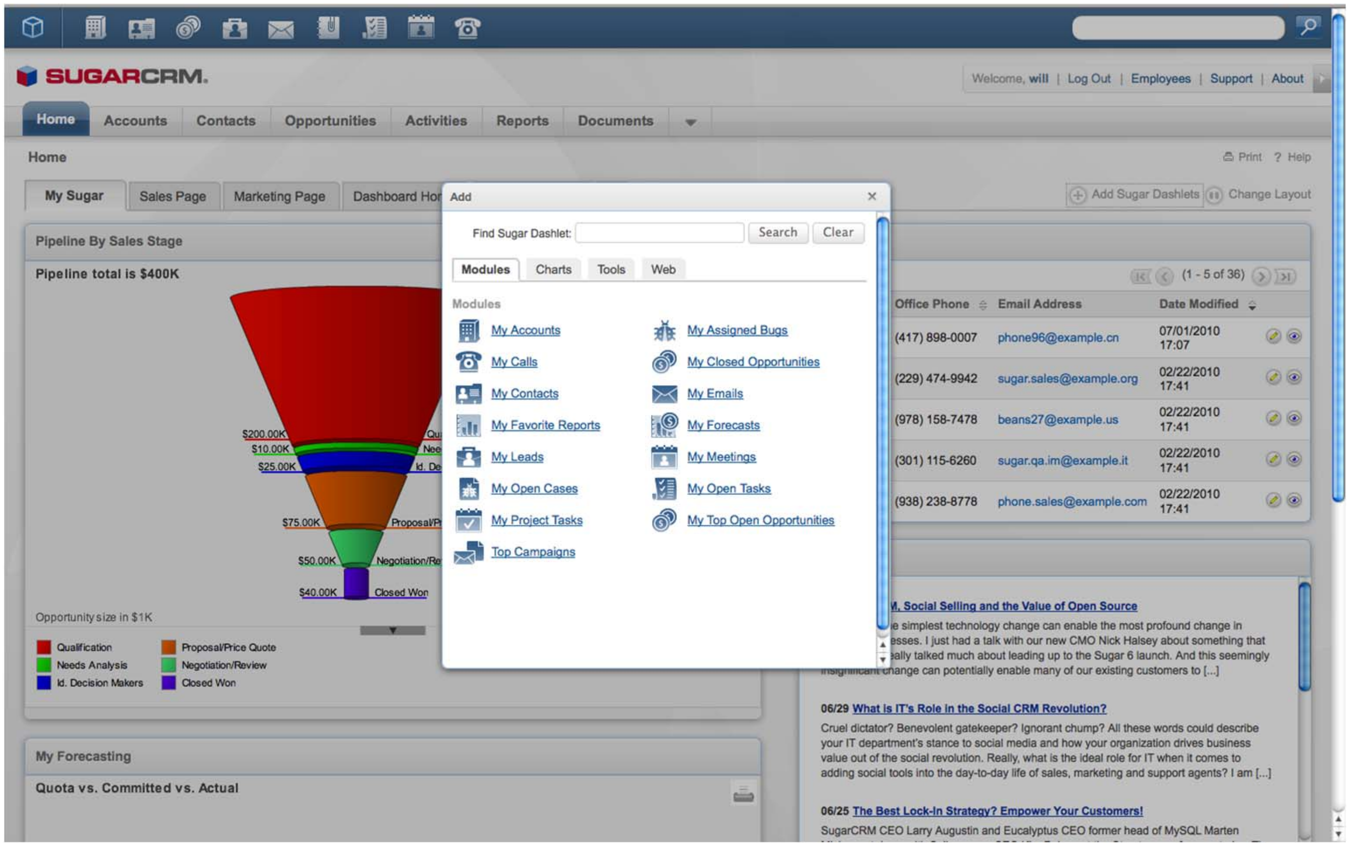
- Intuitive
  - Simple navigation
  - Short forms
  - Offline and Wireless
- Flexible
  - Dashlets and Themes
  - Change tabs/sub-panels
  - Dashboards
- Open
  - Outlook Sync
  - Social media
  - Shared Calendars

Sales Managers

- Reporting
  - Easy to run Reports
  - Share with team
  - Share with executives
- Flexibility
  - Quickly get information they need
  - Adoption increases useful data
  - Meaningful dashlets on home page
- Security
  - Control visibility by module
  - Control actions by module/field

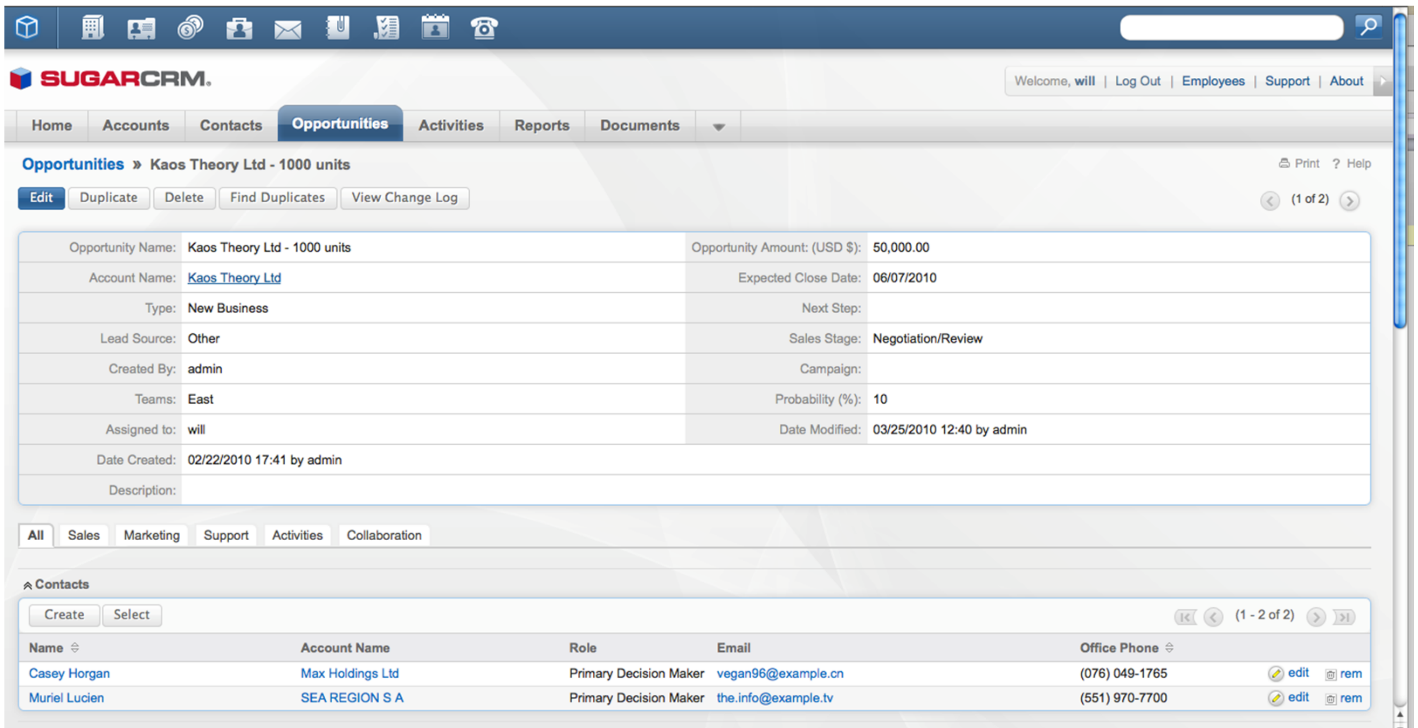
Personalization

- Users can create any number of dashlets on homepage
- Set filters to display only information important to them
- Reports and dashboards update in real-time



Opportunity Management

- Single view of all information regarding an opportunity
- Fully customizable sales stages with weighted amounts
- Gain relevant information with custom fields



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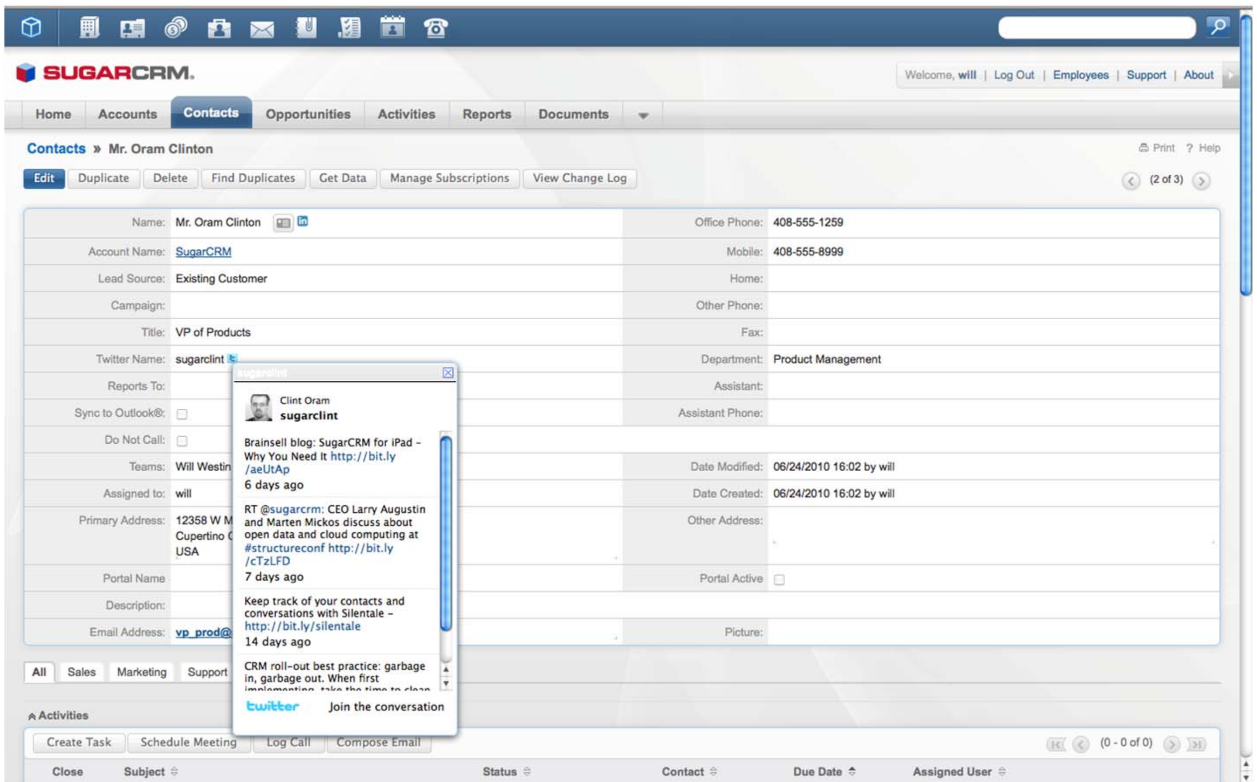
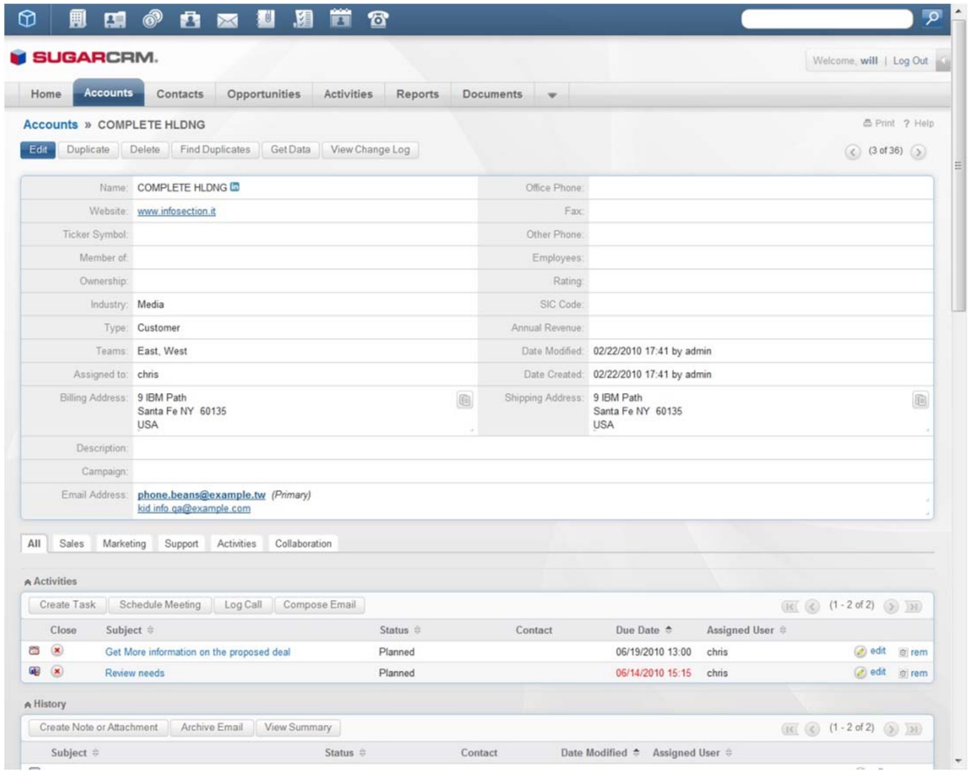
Contact Management

- Simplifies sharing of contact information across teams
- Automatically associates contacts to accounts and opportunities
- De-dupe features ensures contact lists remain clean
- Full access control for sensitive contact information



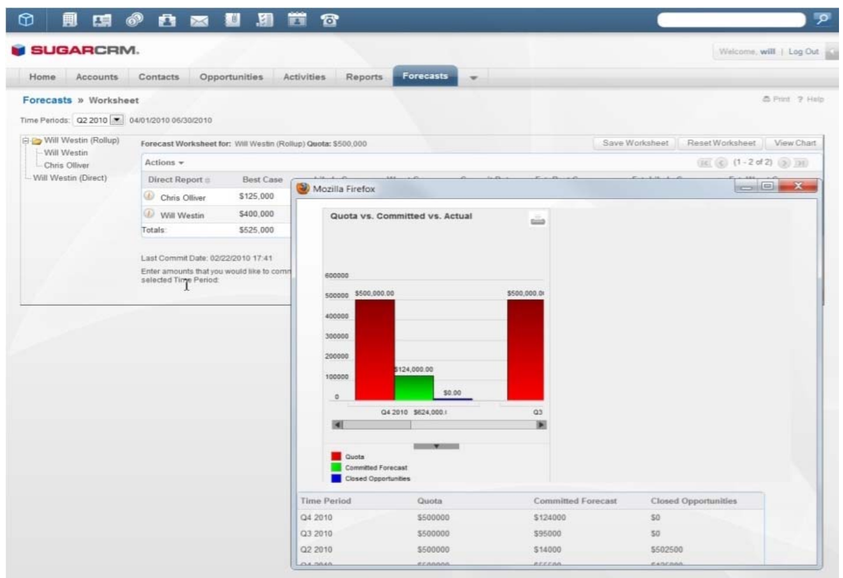
Account Management

- Understand account status and relationships
- Allows initial sales rep to transfer knowledge to Support
- Allows marketing to report on and communicate with customers, partners, and prospects



Forecasting

- Advanced sales forecasting with quota assignment, scenario planning and forecasting worksheets
- Forecasting worksheets allow reps to provide more realistic commit amounts
- Managers have the ability to roll-up accurate forecasts across teams and territories



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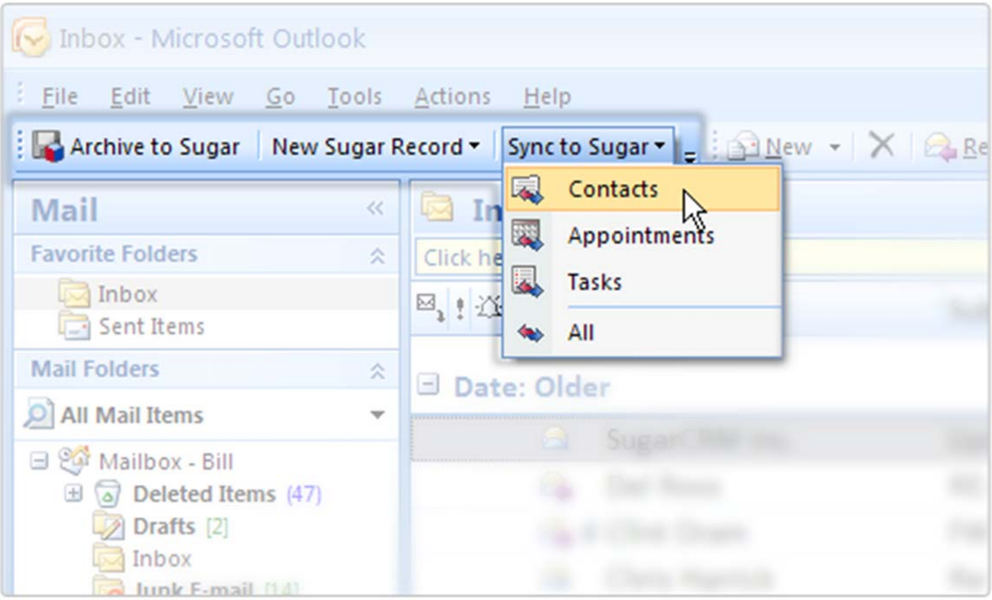
Mobile and Offline

- Improve sales productivity with mobile access solutions
- Access Sugar Suite from any smart phone or PDA
- Work offline and update Sugar information automatically when you return to the network

Sugar Plug-In for Microsoft Outlook

- Capture important customers communications within Sugar
- Ensure calendar and e-mail are coordinated between desktop and Sugar
- Eliminate redundant information



Quote & Contract Management

- Develop and present quotes in PDF format
- Manage revisions and approvals through sales process
- Gain a single view of associated quotes and contracts for each opportunity

Line Items

Group Name: Group Stage: Draft

	Quantity	Product	Cost	List	Unit Price	Discount
1	3	100 user on-premise	$21,693.00	$28,200.90	$28,200.90	10.00%
2	1	Custom Training	$17,130.00	$22,269.00	$22,269.00	10.00%
3	5	40-hour Online Support	$24,314.00	$31,608.20	$31,608.20	10.00%
					Subtotal:	$264,912.70
					Discount:	$26,491.27
					Discounted Subtotal:	$238,421.43
					Tax:	$19,669.77
					Shipping:	$0.00
					Total:	$258,091.20

Grand Total

Currency:	USD	Subtotal:	$264,912.70
		Discount:	$26,491.27
		Discounted Subtotal:	$238,421.43
Tax Rate:	8.25 %	Tax:	$19,669.77
Shipping Provider:		Shipping:	$0.00
		Total:	$258,091.20

Sales Trend Analysis

- Present user-specific information about opportunities
- Consolidate sales data for executives
- Customize charts and reports based on key metrics
- Drill down on charts to understand performance