

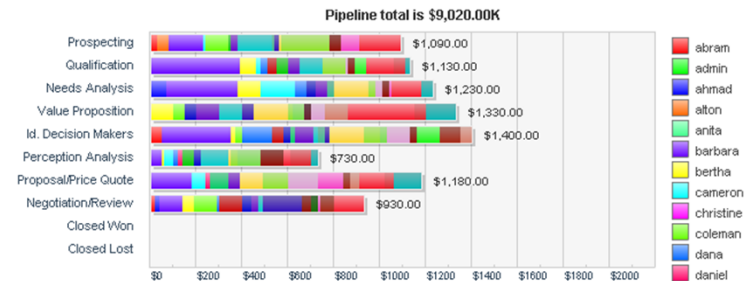


SugarCRM Sales Force Automation

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	<ul style="list-style-type: none">▪ 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	<ul style="list-style-type: none">▪ 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	<ul style="list-style-type: none">▪ 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

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

The screenshot displays the SugarCRM user interface. At the top, there is a navigation bar with the SugarCRM logo and user information (Welcome, will | Log Out | Employees | Support | About). Below this is a main navigation menu with tabs for Home, Accounts, Contacts, Opportunities, Activities, Reports, and Documents. The main content area is titled 'Home' and features a 'My Sugar' dashboard. The dashboard includes a 'Pipeline By Sales Stage' section with a funnel chart showing a total pipeline value of \$400K. The funnel is divided into stages: Qualification (\$200.00K), Needs Analysis (\$10.00K), Id. Decision Makers (\$25.00K), Proposal/Price Quote (\$75.00K), Negotiation/Review (\$50.00K), and Closed Won (\$40.00K). A legend below the chart identifies the colors for each stage. To the right of the funnel is a table of opportunities with columns for Office Phone, Email Address, and Date Modified. A 'Add Sugar Dashlets' dialog box is open in the center, allowing users to search for and add various dashlets from a list of modules, charts, tools, and web dashlets. The dialog box lists modules such as My Accounts, My Calls, My Contacts, My Favorite Reports, My Leads, My Open Cases, My Project Tasks, Top Campaigns, My Assigned Bugs, My Closed Opportunities, My Emails, My Forecasts, My Meetings, My Open Tasks, and My Top Open Opportunities.

Opportunity Management

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

The screenshot displays the SugarCRM interface for Opportunity Management. The top navigation bar includes icons for home, accounts, contacts, opportunities, activities, reports, and documents. The main header shows the user's name (will) and options for logging out, viewing employees, support, and about. The breadcrumb trail indicates the current view is 'Opportunities > Kaos Theory Ltd - 1000 units'. Below the breadcrumb, there are action buttons: Edit, Duplicate, Delete, Find Duplicates, and View Change Log. The opportunity details are presented in a table format:

Opportunity Name: Kaos Theory Ltd - 1000 units	Opportunity Amount: (USD \$): 50,000.00
Account Name: Kaos Theory Ltd	Expected Close Date: 06/07/2010
Type: New Business	Next Step:
Lead Source: Other	Sales Stage: Negotiation/Review
Created By: admin	Campaign:
Teams: East	Probability (%): 10
Assigned to: will	Date Modified: 03/25/2010 12:40 by admin
Date Created: 02/22/2010 17:41 by admin	
Description:	

Below the opportunity details, there are tabs for 'All', 'Sales', 'Marketing', 'Support', 'Activities', and 'Collaboration'. The 'Contacts' section is expanded, showing a list of contacts with columns for Name, Account Name, Role, Email, and Office Phone. The list includes two contacts: Casey Horgan (Primary Decision Maker at Max Holdings Ltd) and Muriel Lucien (Primary Decision Maker at SEA REGION S A).

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

The screenshot displays the SugarCRM web interface. At the top, there is a navigation bar with icons for home, calendar, mail, and other functions. Below this is the SugarCRM logo and a user welcome message: "Welcome, will | Log Out | Employees | Support | About". The main navigation menu includes "Home", "Accounts", "Contacts", "Opportunities", "Activities", "Reports", and "Documents". The "Contacts" tab is selected, showing a view for "Mr. Oram Clinton".

The contact details are organized into a grid-like form:

- Name:** Mr. Oram Clinton
- Account Name:** SugarCRM
- Lead Source:** Existing Customer
- Campaign:**
- Title:** VP of Products
- Twitter Name:** sugarclint
- Reports To:**
- Sync to Outlook:**
- Do Not Call:**
- Teams:** Will Westin
- Assigned to:** will
- Primary Address:** 12358 W Cupertino, CA, USA
- Portal Name:**
- Description:**
- Email Address:** vp_prod@

On the right side of the form, there are additional fields:

- Office Phone:** 408-555-1259
- Mobile:** 408-555-8999
- Home:**
- Other Phone:**
- Fax:**
- Department:** Product Management
- Assistant:**
- Assistant Phone:**
- Date Modified:** 06/24/2010 16:02 by will
- Date Created:** 06/24/2010 16:02 by will
- Other Address:**
- Portal Active:**
- Picture:**

An "Activities" section is visible at the bottom of the contact record, with buttons for "Create Task", "Schedule Meeting", "Log Call", and "Compose Email". A list of activities is shown below, including:

- Brainsell blog: SugarCRM for iPad - Why You Need It <http://bit.ly/aeUzAp> 6 days ago
- RT @sugarcrm: CEO Larry Augustin and Marten Mickos discuss about open data and cloud computing at #structureconf <http://bit.ly/jcTzLFD> 7 days ago
- Keep track of your contacts and conversations with Silentale - <http://bit.ly/silentale> 14 days ago
- CRM roll-out best practice: garbage in, garbage out. When first implementation, make the time to clean up. [Join the conversation](#)

The interface also includes a search bar at the top right, a "Print" button, and a "Help" icon. At the bottom of the page, there is a footer with the date "6/6/2011", the copyright notice "©2010 SugarCRM Inc. All rights reserved.", and the page number "7". The SugarCRM logo is located in the bottom right corner.

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

The screenshot displays the SugarCRM interface for an account named 'COMPLETE HLDNG'. The account details are as follows:

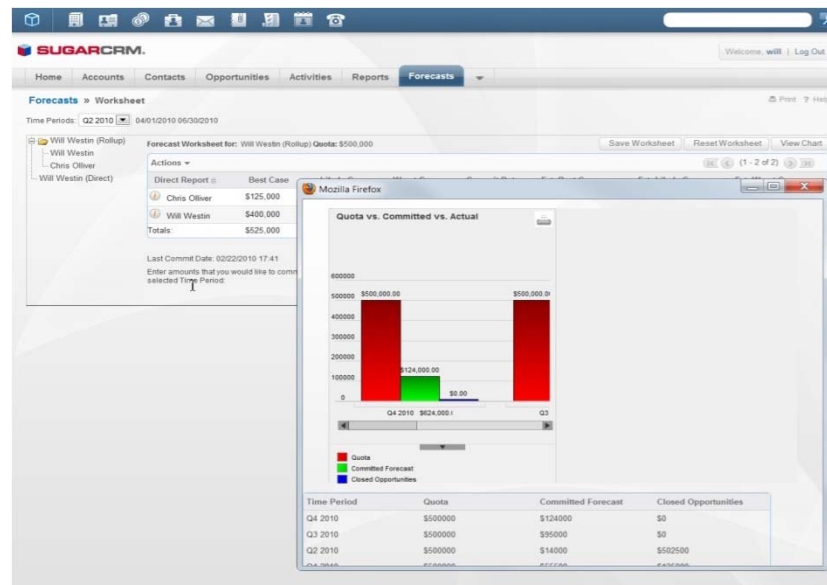
Name:	COMPLETE HLDNG	Office Phone:	
Website:	www.infoaction.it	Fax:	
Ticker Symbol:		Other Phone:	
Member of:		Employees:	
Ownership:		Rating:	
Industry:	Media	SIC Code:	
Type:	Customer	Annual Revenue:	
Teams:	East, West	Date Modified:	02/22/2010 17:41 by admin
Assigned to:	chris	Date Created:	02/22/2010 17:41 by admin
Billing Address:	9 IBM Path Santa Fe NY 60135 USA	Shipping Address:	9 IBM Path Santa Fe NY 60135 USA
Description:			
Campaign:			
Email Address:	phone_beans@example.tv (Primary) kid_info_ga@example.com		

Below the account details, there are sections for 'Activities' and 'History'. The 'Activities' section shows two planned tasks:

Close	Subject	Status	Contact	Due Date	Assigned User
	Get More information on the proposed deal	Planned		06/19/2010 13:00	chris
	Review needs	Planned		06/14/2010 15:15	chris

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



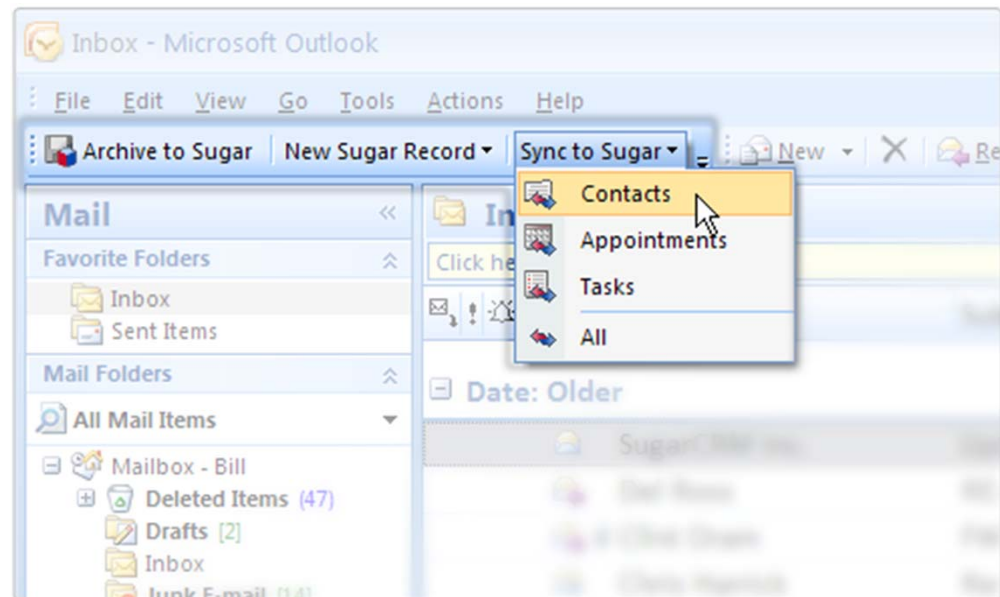
Mobile and Offline

- 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

