

SUGARCRM EXECUTIVE BRIEF

# Hitting Your Numbers

Creating Sales Excellence with Commercial Open Source CRM



It is already a given that a CRM system can help drive sales performance. So the decision to be made now is which CRM provider is right for your sales organization. SugarCRM® is based on commercial open source software, which gives the product a variety of benefits above and beyond proprietary CRM products from different providers. Here are just a few of the ways in which SugarCRM and its commercial open source approach are the right choice for helping you achieve sales excellence.

### **Flexibility**

SugarCRM is based on an open source model that allows users greater access to the source code. This allows users to make deep customizations faster, since they are free to access the source code. Users can take the core product and make it fit their unique business needs with ease.

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*“Switching from Salesforce.com to Sugar was a no-brainer with the flexibility and cost-savings we realized.”*

—Director of Sales, Archer Technology Group

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And with new workflow additions, SugarCRM now automates your exact sales processes. Most multi-tenant hosted products cannot offer such process automation without high costs. SugarCRM offers users an affordable way to automate key sales processes—insuring that all sales associates are following the best practices required for raising top line revenue and providing top of the line service to every account.

From a custom integration perspective, SugarCRM is also more flexible and affordable as well. Users can draw from a variety of databases and back-end systems, such as SAP, for free. In contrast, pulling data into Salesforce.com from an Oracle database as well as an instance of SAP would cost a Salesforce.com user an additional \$24,000 per year, regardless of the size of the deployment.

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*“You do not want to know how much we spent on Salesforce.com customizations.”*

—General Manager of Sales, Sterling PCU

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## Feature Breakout – Dashboards

The extensible nature of open source has resulted in some great features for salespeople, from the representative level all the way up into views into the data for executives. One feature that really exhibits how SugarCRM has adapted for sales users is the customizable dashboards.

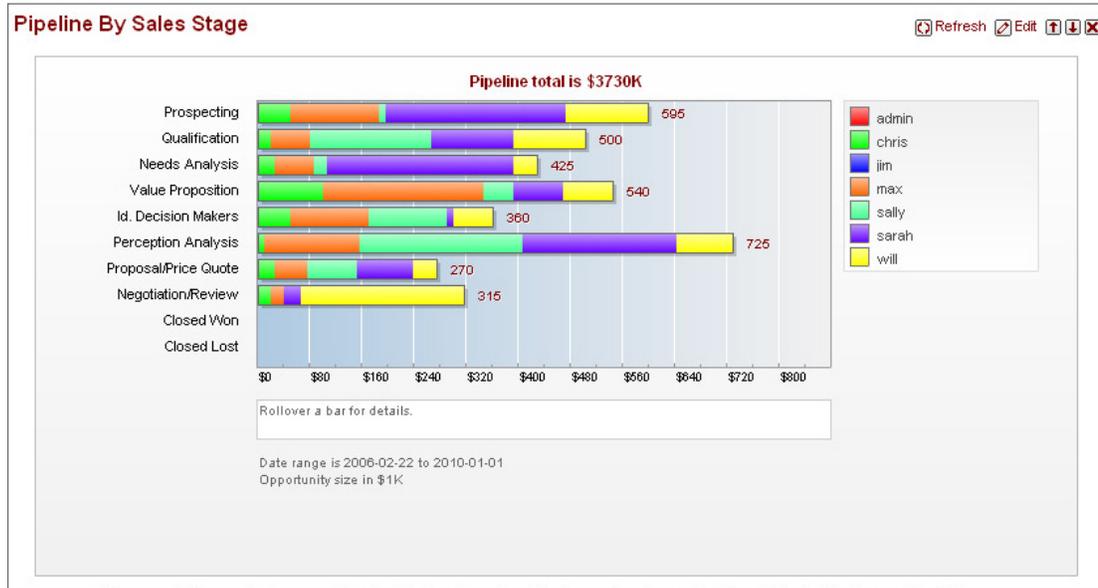


Figure 1. This dashboard provides sales managers instant visibility into all of the sales activities of their teams. Managers can take a high level view, or drill down for more granular insight into specific deals or opportunities at every stage of the sales process. Other dashboards are available that best suit individual sales representatives and their daily activities. SugarCRM includes dashboard views for a variety of key sales roles.

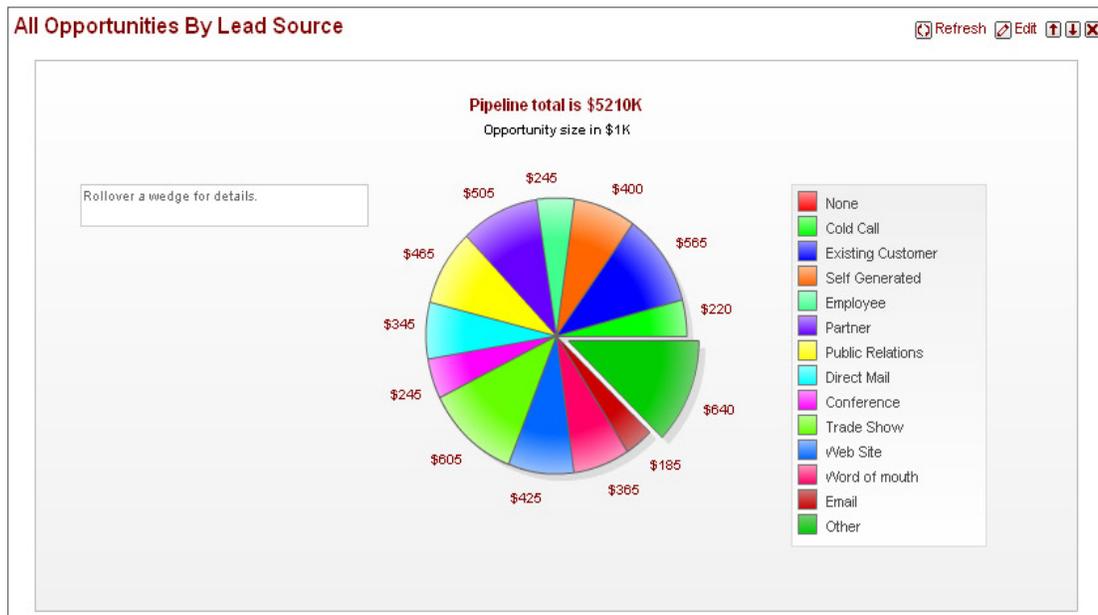


Figure 2. SugarCRM dashboards are very flexible, and easy to use. With just the click of your mouse, variables can be added or removed. And the look and feel of the dashboard can be altered just as easily to fit the preferences of sales reps or managers alike. The important fact is that all of the important data is readily available to users, in a way that best fits in to their work day.

### Greater Innovation

The nature of open source development hinges on the notion of a large external development community. This means that new functionality priorities are determined by the community and users at large, not a central proprietary development team. Therefore, the best sales automation features that really affect your business and revenue are likely to be development priorities – not bells and whistles that make a proprietary product look nice, but ultimately provide little business value.

### Faster Deployment

One of the greatest benefits of open source CRM is that it can be deployed much faster than proprietary products that require a large amount of professional services work to get up and running. Since SugarCRM can be deployed faster, sales reps can start using the product faster, which provides a shorter timeframe for return on investment.

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*“Our senior technical people were able to download the open source version of SugarCRM code with documentation, and have it up and running and operational on our server within 24 hours.”*

—Chief Information Officer, Oregon Department of Human Services

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SugarCRM also gives users multiple deployment options. Users of SugarCRM can choose between an On-Demand hosted solution, an on-site software deployment, or deploying SugarCRM on a preconfigured appliance. Sugar is flexible enough to fit the exact needs of your sales organization. So no matter what your needs, deploying SugarCRM can be far more painless than using proprietary CRM offerings.

This chart can help you decide which deployment option is right for your sales team.

Business Issue	SugarCRM On-Demand	SugarCRM On-Site
Custom, complex sales processes		X
Sales data must be integrated with back-office systems?		X
Basic forecasting and pipeline visibility needed	X	
Fast, low-risk deployment preferred	X	
Little to no internal IT resources	X	
Mobile sales force in place	X	X
Ownership of data is critical		X

\* Alex Bona, Gartner Group: *CRM on Demand is More Expensive Than You Think*, 26 May, 2004

“SugarCRM On-Demand is economical and easy-to-use. Most importantly, it allows us 24-7 access worldwide with no administration headaches. It is robust, reliable and we have experienced zero downtime.”

—VP Business Development, SAMMA Systems

## Faster Adoption

SugarCRM offers one of the most modern and intuitive user experiences on the market. The product’s use of Ajax technology allows individual users to personalize their Sugar experience without the use of IT. So, sales reps can configure their view of Sugar to meet their needs in an instant—no coding necessary. And sales agents that are happier with the CRM product are more likely to use that product. So, pipeline visibility increases which allows for greater sales forecasting abilities.

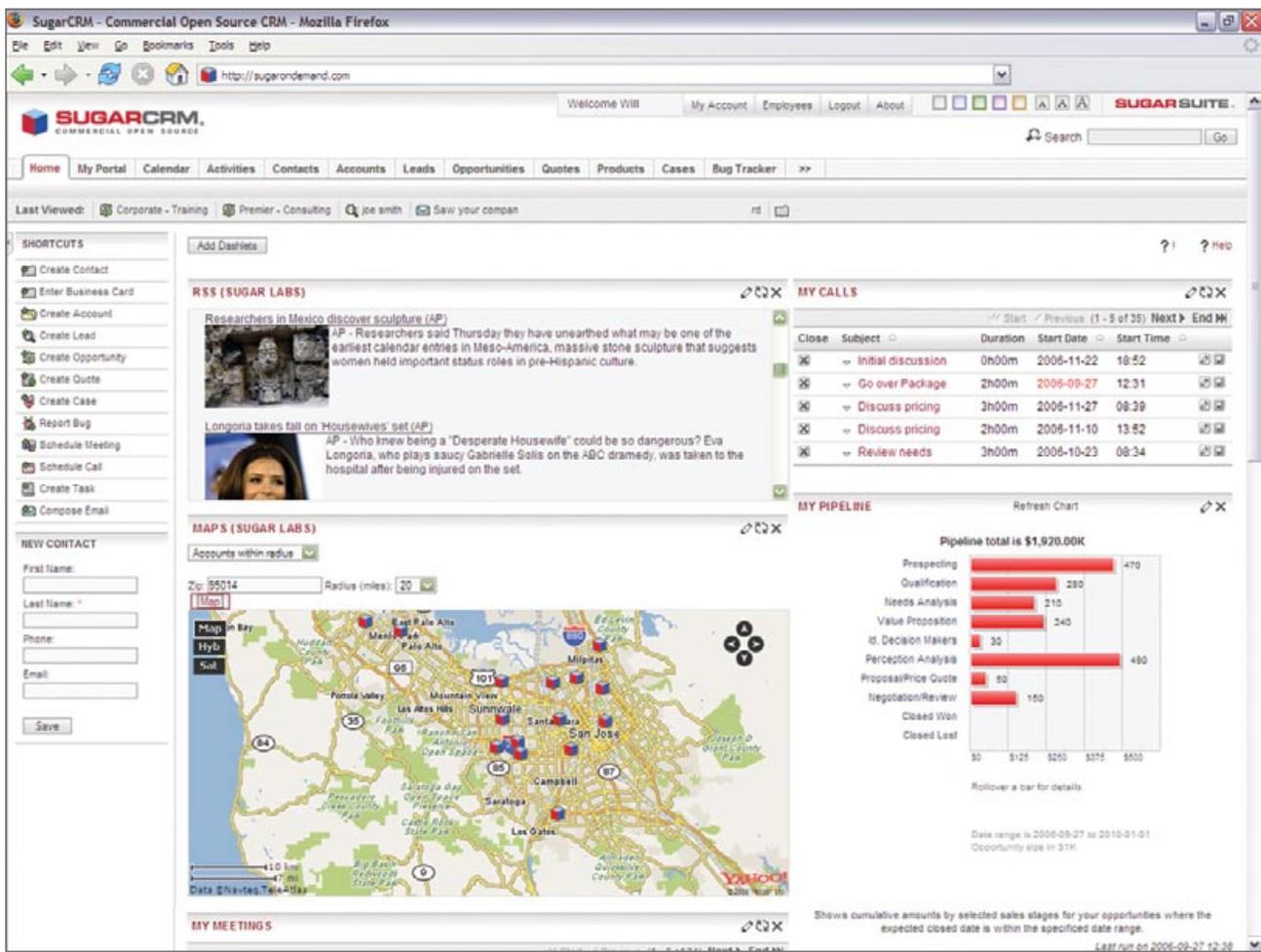


Figure 3. Sugar UI: The SugarCRM user interface can be easily customized to fit the needs and personalities of individual users, as well as easily configured to suit the daily tasks of key role players, such as sales managers. And its modern architecture allows users to easily pull in data from the Web or other external sources, such as related RSS feeds, Google maps data mash ups with contact or opportunity lists, or back-office data from an ERP system.

*“We did not want to go out and buy a bunch of ‘CRM for Dummies’ books for our reps to learn the system. SugarCRM’s better functionality, the flexibility of being able to select a hosted, appliance, or on-premise solution, and the fact that Salesforce.com was going to charge us to integrate our other applications through the platform, made it an easy decision in the end.”*

—CTO, BZ Results

### Lower TCO

A lot of CRM systems do the same thing when it comes to sales force automation. Most every CRM product worth its salt has pipeline management, activity management, opportunity management, etc. But what makes SugarCRM so great is that its open source development model allows it to offer all of this functionality at an attractive price point. And Sugar On-Demand allows you to get up and running on a full-fledged CRM system without a lot of up front license fees, new servers, and database administration costs.

Since open source offers a lower price point both initially and over the life of the CRM initiative, your sales organization can dedicate resources to other areas. This means you can invest in people and core sales activities—not technology issues.

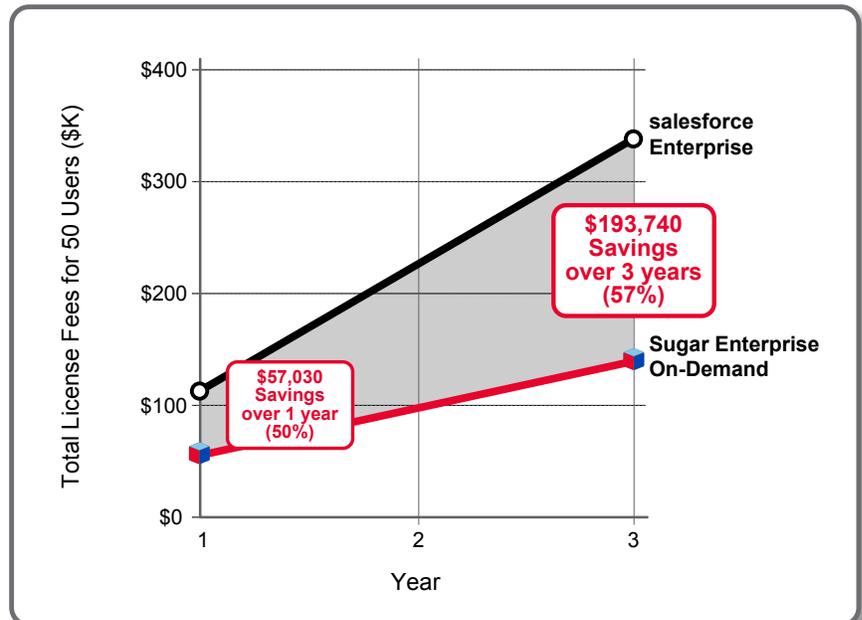


Figure 4.

Open Source software is simply less expensive than proprietary CRM, regardless of the deployment method. While some SaaS vendors like Salesforce.com claim to be low cost and low risk, they are actually much more expensive than SugarCRM’s commercial open source hosted offering. This chart shows the cost savings that can be achieved over time when opting for SugarCRM over Salesforce.com.

One SugarCRM customer, Athenahealth, saw initial ROI in only *NINE MONTHS* after switching from Salesforce.com to SugarCRM.

### Make Marketing Count

SugarCRM is a full CRM suite – not just an isolated sales automation product. So included in the product are deep marketing campaign automation and tracking tools, all tightly integrated with the sales automation module. This means that with the touch of a button, sales managers can see what campaigns led to the most sales. And users can easily see the campaign source for all leads in the sales pipeline. With SugarCRM, you can make the most of your campaign dollars and truly close the loop between sales and marketing.

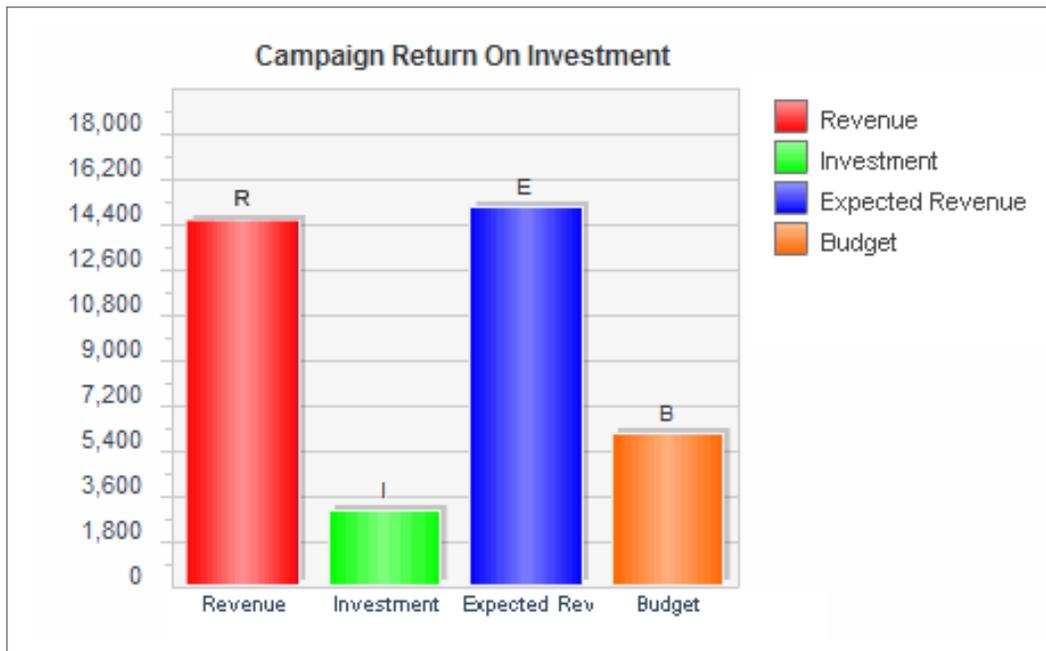


Figure 5. SugarCRM allows you to tightly link sales and marketing activities. This dashboard view shows how easy it is to associate actual revenue to the marketing campaigns that sparked that income.

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*"We moved to SugarCRM from salesforce.com because Sugar gives us twice the functionality at half the price."*

—General Manager of Sales, Sterling PCU

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### The Right Mix

SugarCRM brings together the right mix of sales automation tools, flexible deployment options, and an easily customizable platform thanks to its open source model. And the open source model allows all of this flexibility at a much lower price point. So, whether you have a small sales force and basic automation needs, or a large sales organization spanning several regions around the globe, SugarCRM has a CRM tool that is right for your needs.



## Excellence in Action: Moss & Hooper

### The Problem

Moss & Hooper, one of Australia's leading outsourcers of software sales, is all about selling. However, as the company was growing, it lacked a central CRM system to track activities, sales and promote collaboration between sales and marketing teams. Moss & Hooper's competitive advantage stems from the deep professional relationships its sales professionals have built during their careers. Most of those contacts resided in individual rolodexes or "little black books" which the salespeople depended on for new and existing business. Unfortunately, this siloed approach prevented Moss & Hooper from being able to share leads, opportunities and account plans across individuals. It also made it difficult for the company to report to its clients about the success rates of opportunities and expected revenue the firm would generate. So, Moss & Hooper began to evaluate different CRM products.

### The Sugar Difference

Moss & Hooper had a variety of criteria in place when choosing a CRM system. The company wanted an easy-to-use, cost effective CRM system that would not require IT expertise or resources. Another criteria was flexibility. As experts in the field of sales management, the Moss & Hooper team has strong opinions regarding sales processes and methodologies. Thus, their system would have to offer easy customizations to fit the business, as opposed to the other way around.

After a rigorous evaluation period, Moss & Hooper found that SugarCRM was the most flexible and cost effective product that would best fit its sales team. The company selected Insightful Customer Relations, a premier solutions provider for SugarCRM, to handle their local implementation. Insightful then customized SugarCRM to match Moss & Hooper's unique sales methodologies.

### The End Result—Sales Success

SugarCRM proved to be an easy-to-use product and began to win over even the most skeptical sales agents inside Moss & Hooper. Most agents liked the intuitive design, and the quick response time of the web-based product. "It was impressive to see how quickly the Moss & Hooper team picked up on the system," says Marc Englaro, Principal Consultant, Insightful Customer Relations. "The Moss & Hooper employees are expert salespeople so they do not have much patience for projects that won't help them do their jobs better. With SugarCRM it was a match made in heaven."

The addition of SugarCRM into the sales processes at Moss & Hooper also resulted in increased collaboration between sales teams and management. Sales representatives no longer guard their leads and contacts. Instead, through information sharing, Moss & Hooper employees are now able to deliver improved customer satisfaction. This collaborative environment is now evident during sales meetings which have become more focused on solving customer problems as opposed to dealing with sales processes. And improved reporting capability is leading to improved customer satisfaction overall, since the company could now provide more insight into deals won and lost for their clients. But of course, the most important benefit of all—following up on more leads and closing more opportunities now that SugarCRM is in the mix.



## Excellence in Action: CBI Group, LLC

### The Problem

The CBI Group is not only a human resources consulting and outsourcing company, it is also one of the fastest growing private firms in the Mid-Atlantic region. The CBI group also has about 50 percent of its workforce working remotely, so it needed a Web-based CRM solution, but one that was very flexible and extensible. For example, the company saw integration between its project management capabilities and sales automation system as a priority. It knew that it could not go with a traditional client-server product. But a hosted CRM product would also be limited in terms of deep integration with important legacy systems.

In addition to the need for integration and universal access for its distributed staff, the product had to be easy to use. Adoption of the system was considered critical by CBI Group. The company also wanted strong reporting capabilities, to make better sense of its rich customer pipeline data.

### The Sugar Difference

The open source nature of SugarCRM is what made it such an attractive choice for the CBI group. Unlike other proprietary CRM products, CBI Group's IT staff could simply download the open source version of the CRM suite and take it for a test drive. And the company knew that with an open source model, the integration and customization that CBI wanted to perform could be completed in a much more cost effective manner.

And since SugarCRM is developed in part by users out in the community and not engineers with little sales experience, the product fit CBI Groups standards for ease-of-use, and knew it would be widely adopted inside the organization. "SugarCRM is a very intuitive system. It's very easy to use, and the whole team grasped onto it," says Judi Dorazio, Practice Leader, CBI Group.

### The End Result—The Sugar-Powered Sales Organization

With its CRM system integrated with its project management and high user adoption, CBI Group is gaining greater visibility into how the business is performing. Sugar Professional sales and project information guides executive meetings and helps to determine which direction to take the business. "SugarCRM's sales automation functionality has done wonders for us," says Dorazio. "It gives us real-time snapshots into our daily pipeline. There are times where we hold our sales meetings based entirely on the dashboard and pipeline reports generated from Sugar Professional."

And as CBI Group continues its growth, it plans to extend Sugar Professional to meet the changing demands of its business. With SugarCRM, CBI Group has found an application that does not get in the way of people doing their job. Instead, it makes their job a lot easier. "Overall, it's a great tool that we plan to use more and more," says Dorazio.



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