Five Touch Points With SugarCRM®

Key Integration Points to Extend the Value of Your CRM System

Integration between CRM solutions and other mission-critical business applications has had a long, yet troubled, history. Traditionally, it's been difficult to integrate these systems because of the proprietary architectures of the solutions and the lack of standards for exchanging data. This is still the case with many upper-mid-market and enterprise customers who have implemented CRM solutions that are tied to, but not sufficiently integrated with, ERP, content management systems (CMS), or E-commerce solutions.

The current limitations imposed by on-premise legacy software and the multi-tenant software-as-a-service (SaaS) model has resulted in a new breed of applications and architectures being developed to these needs. Open source languages and open standards are coming to the forefront, resulting in supple software architectures and software development models, which in turn has lead to more flexible business applications delivered on-demand or on-premise.

This resulting fallout has lead to new development models such as cloud computing/Web platforms, multi-instance architectures for on-demand offerings, and open source software. By 2010, Gartner says 80 percent of composite enterprise applications will be built using Web mashups, which will continue to evolve significantly over the next five years. And as SaaS becomes an ever-more-viable option, emerging Web platforms are providing access to infrastructure services, information, applications, and business processes through Web-based "cloud-computing" environments, and allowing businesses for the first time ever to leverage a SaaS solution as a foundation to design and create complimentary applications and modules that are linked to their CRM systems.

Moving forward, open source will be the vehicle by which the next generation of SaaS platforms will deliver their results. Gartner says that by 2010, 80 percent of all commercial software will include elements of open-source technology, which are now mature and reliable. Open source will provide significant opportunities for vendors and users to lower their total cost of ownership and increase return on investment.

SugarCRM is at the forefront of these trends with its open source, standards-based architecture which enables applications to be delivered via on-site or on-demand, and seamless integrated with other mission-critical applications. Below are five examples of the most common integrations SugarCRM customers make by leveraging SugarCRM's open source model, in addition to describing their importance and resulting business benefits.

1. ERP

The integration of ERP and CRM applications isn't new. The concept has been around for more than a decade, and is the reason why many ERP mainstays began staking claims in the CRM market in the late 1990s. In 1997, ERP specialist Baan bought promising sales automation provider Aurum, and in 1999 PeopleSoft snared Vantive for $433 million.

Yet despite the development of suite solutions, specialized standalone applications still abound. Whether through the purchase of a suite solution or the integration of a standalone CRM system to an ERP solution, the goal of an amalgamation between CRM and ERP remains the enterprise dream: a front and back-office software solution with seamless integration, unified support, and all the latest features.

There are a number of reasons why businesses should integrate their CRM and ERP solutions; too many to go into detail here. But for starters, companies with high volume sales transactions see almost immediate benefits in the order-to-cash process. Specifically, the cost savings come from reducing errors in order entry, implementing approval workflows for discounts, and reducing the manual labor required to enter orders in both CRM and ERP. Even organizations with relatively low order volumes can experience significant cost reductions through improved order accuracy.

At the end of the day, the main reason to integrate is money. Integrating CRM with ERP can secure a lucrative financial return on investment, and thanks to the newfound focus on integration and customization by vendors, it's never been easier.

Customer Case Study:

InterAct Public Safety Systems Streamlines Sales Process with ERP Integration

Powering mission-critical public safety and homeland security systems, InterAct Public Safety Systems has been at the forefront of performance and innovation in keep citizens safe for the past 30 years.

Looking to implement a more economical and flexible IT strategy, InterAct deployed SugarCRM and MySQL hoping to integrate them with other existing systems.

MySQL and Sugar's open source architecture has allowed both systems to integrate with InterAct's corporate intranet system as well as their Microsoft Great Plains ERP system.

With all four systems tightly aligned, invoices and product information is automatically synchronized allowing for a streamlined fulfillment process as well as more productive sales team.

2. E-commerce

Whether your business is business-to-consumer (B2C), or business-to-business (B2B), or both, chances are you rely heavily on e-commerce to conduct operations with your customers. Integrating a CRM system with your e-commerce platform can allow companies to run their entire business more effectively helps you keep up to date with what your customers are doing, all the while providing an intuitive, "Amazon.com-like" experience to your customers.

Organizations can efficiently link a sales force with their e-commerce operation, offer your customers a choice of how to purchase and free up a sales team to concentrate on winning new business and managing relationships while your e-commerce-enabled Web site deals with repeat orders.

E-commerce has also transformed into an avenue for customer and partner service. Tighter integration between SugarCRM and e-commerce had lead to the creation of self-service, shopping, and 3rd party vendor portals, with your e-commerce solution acting as a gateway into a business' CRM system and data, allowing customers to conduct business 24 hours a day, 7 days a week. SugarCRM customers can more efficiently manage their Web stores by checking on inventory and fulfillment, market to different customer segments, and track and report all Web and sales activities via one system with a 360-degree view of your shoppers, including purchase history and marketing and support communications.

Customer Case Study:

Red Balloon Days Bridges Gap Between E-commerce and CRM

Having served over 100,000 individuals, Red Balloon Days has been busy helping companies reward employees with an expansive selection of gifts, culinary treats, and exotic trips.

Experiencing tremendous growth and heavy volumes of transactions, Red Balloon Days hoped to improve internal systems to better track customer inquiries and orders.

Enlisting the help of Insightful Solutions, Red Balloon Days selected SugarCRM hoping to integrate Sugar to their web site and e-commerce portal.

Using SugarCRM's SOAP XML API web services interfaces, customer information is now synchronized between the company's web site, e-commerce portal and SugarCRM allowing for the elimination of manual processes and a more accurate tracking system of customers, orders, and gift fulfillment.

3. Accounting

In terms of customer data, the intersection between sales/marketing and finance/accounting generally tends to be determining customer profitability, or determining which of company's customers is its most profitable. It's a problem that tends to originate from the fundamental differences in the methodologies and business processes associated with each department.

Traditionally, finance has focused on cost-and-revenue analysis, with the end goal of assigning profit and loss across multiple lines of business and allocating revenue across different product lines or services, typically relying on data from general ledgers and ERP systems. On the flip side, sales and marketing has taken a more customer-centric focus, looking to segment an organization's most profitable customers via CRM data to develop campaigns and identify cross-sell and up-sell opportunities. Having a properly integrated CRM and accounting solution is critical in allowing each department to assessing the data leveraging their own methodology, while at the same time providing upper management with a company-wide customer analysis strategy whereby a set of common dominators are established that all departments can buy into.

In terms of the technology, a pre-integrated end-to-end solution offers out-of-the-box integration, but the final product is the lowest common denominator—meaning it doesn't fully solve any one department's needs due to its rigidity. By leveraging best-of-breed CRM and ERP solutions melded together with customer integrations, businesses can have the best of both worlds.

Customer Case Study:

IdealShield Gains Further Insight into Sales Process with Accounting Integration

Founded in 1996, IdealShield has thrived in making large-scale facilities like stadiums, malls, and factories safer with their wide array of aesthetically pleasing safety products like guardrails, bumper sleeves, and safety bollards.

Hoping to streamline internal sales processes as well as increase collaboration between IdealShield's five factories, the company looked to implement a more robust and flexible CRM system.

Enlisting the help of SugarCRM partner Polylogical Solutions, IdealShield implemented SugarCRM and looked to build integration with their existing Sage MAS 200 accounting software.

Sugar now serves as the master of all customer information, triggering updates in the MAS system in real time. IdealShield has also benefited from a direct open database connectivity read into MAS200 that allows employees to see customized dashboards to view sales backlogs that gives them additional insight into where resources need to be allocated.

4. Content Management System (CMS)

What HDTV brought to television, broadband has brought to the Internet for Web designers. Long constrained to modem and telephone lines, the days of dial-up are coming to an end as broadband takes over. Companies are beginning to exploit the irresistibly rich audio, video, animation, and user-interface capabilities of contemporary personal computing to provide today's e-savvy consumers with the same look and feel of brands they know and love.

To that end, integrating a CRM solution to your company's CMS application or other Web design tools has never been more important. Assisting in such endeavors is the nature of today's Web-based and Web-orientated software applications. The payoff is the ability to more effectively communicate with customers, affiliates, and 3rd party lead generation systems.

Some of the most common ROIs include the ability to improve your business' fulfillment operations; analytics to measure customer Web paths and site traffic; the ability to effectively manage and maximize the revenue potential of your customer base; affiliates and shopping portals to promote products and sales; and social networking, customer review sites, and other Web tools to add additional functionality to your site as new technologies and trends emerge.

By integrating CRM with CMS, a business can actively track visitors on their Web site, allowing you to collect and analyze statistics on site usage, which in turn can be feed back into SugarCRM to allow for more targeted marketing content on your Web site, including documents, click-through rates, and pages viewed.

Santa Clarita
webservices

Customer Case Study:

Clarita Web Services Integrates Sugar with CMS

Founded in 2003, Santa Clarita Web Services (SCWS) has been instrumental in helping emerging small businesses meet their growing technology and web needs.

In need of a CRM system to track their growing product offerings and customer base, SCWS selected SugarCRM hoping to take advantage of Sugar's open source architecture integration possibilities.

In particular SCWS wanted to integrate their CMS system, Joomla, to Sugar allowing information on their web site to be shared and stored within Sugar and vice versa.

Utilizing Sugar's open API's, SCWS was able to integrate the two open source solutions within a week of deploying Sugar.

With the CMS integration in place, SCWS has been able to reduce the amount of processing time in handling inbound requests via their web site customer portal. Information is entered on the web site and automatically updates in Sugar where employees are able to address the inquiry. Updated records within Sugar can then be seamlessly updated to display on SCWS's web site allowing for a shorter and richer customer experience.

5. Telephony

Computer Telephony Integration (CTI) and Voice over Internet Protocol (VoIP) are both strategic components of a contact center and are used to link the telephony system to information held within a CRM database about the caller. Until recently, the integration of such solutions could an expensive undertaking available to only the largest call centers.

But thanks to open-based APIs and open source architectures, integration of telephony solutions and CRM has become drastically easier. The resulting integration allows agents to interact with a CRM system in near real-time, and can result in improved call handling and response times, as callers are identified immediately and customer contact info and related data can be uploaded automatically.

All too often, call centers gain a poor reputation by herding every caller through the same process, irrespective of the caller's needs or history. By integrating Telephony with SugarCRM, a company can differentiate callers for appropriate service. At its simplest level, this could mean automatically routing customers along the "red carpet" to specific service agents and bypassing the usual menu system. Businesses could also rout certain callers to the most appropriate agent given their level of request or product expertise. Finally, integration of telephony with SugarCRM can mean that any changes made by the agent during wrap-up are immediately available for future call routing—the same caller could call back minutes later and experience a completely different flow.

GEEKS ON THE WAY ®

Customer Case Study:

Geeks on The Way Reaps Benefits with Integration to Telephony System

With over 20,000 customers spanning Western Canada, Geeks on The Way has helped many local businesses and technology users resolve various desktop and network issues.

Experiencing tremendous growth and heavier amounts of service calls, Geeks On The Way looked to implement a CRM system that could integrate with their Asterisk PBX open source telephony system. SugarCRM being an open system allowed Geeks on The Way to perform deep integrations at the data and application level.

With the integrated system, callers are recognized by their phone number or other identifiers, and their customer record in Sugar pops up on the agent's screen as he or she answers the call. If a new client is calling, a "new contact" screen pops up to the agent and a tight integration with an external database of address and postal information populates most of the new contact record. This allows agents to process existing customers quickly, and also spend less time adding new customers in to the system.

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