

SUGARCRM EXECUTIVE BRIEF

Grow Your Business, Not Your Support Costs

Creating a cost-effective, multi-channel support operation with SugarCRM®



Supporting customers is a necessary part of doing business in today's world. And the ubiquity of the internet means customers wish to seek support via multiple methods. Fortunately, with advancements in technology, organizations can offer high levels of customer support at a fraction of previous costs.

SugarCRM allows users to better manage their customer service and support operations in many ways. SugarCRM users can address inbound customer communications via multiple channels. SugarCRM also allows users to centrally store and manage important support information in a core Knowledgebase module. Customers can also be offered self-service options via SugarCRM's strong web portal technology offerings. And call center manager as well as other support leads can gain greater visibility into how the company is responding to customers through strong reporting tools that offer out of the box insight to service operations.

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Jorge Teixeira da Silva
Project Manager, UZO

Introduction

Organizations of all sizes have one thing in common - customers. While the ideal scenario is to have 1005 happy customers 100% of the time, the reality is that customers can and will have issues with your products or services. Meeting customer support needs has generally been considered a necessary cost of business, one that rises gradually as your business grows in kind. But with an intelligent customer support software package, fully integrated with other customer relationship management (CRM) functions, supporting customers can be a less costly endeavor.

Customer support falls into many categories, and many activities can be considered customer support processes. For example, simply responding to a curious customer's email can constitute a support experience. Answering questions about a new product via the telephone, or explaining how to install or troubleshoot a product are common support activities. And allowing customers to find answers to their questions in special areas of a corporate web site is also a common customer support issue.

These activities seem diverse in nature, and cover a wide range of access points and data types utilized in the interaction. Without a single, central platform to house all of these activities, it becomes difficult or impossible to offer a consistent support experience to customers. But when organizations leverage SugarCRM as a core support platform, they can better manage all of their customer interactions, and create a unified face to the customer to better address their needs in a cost-effective and complete manner.

Multi-Channel Case Management

The core of SugarCRM's support capabilities reside in the Case management module. This module allows users to see a detailed view of customer requests and responses. These can be phone calls, emails or other types of exchanges – all tracked and easy to view within the Sugar user interface. This allows not only a centralized area for housing multi-channel communications with the customer, but can help bridge the gap between sales and support. Since sales agents can see into case history, they can

see if a support issue has not been resolved. This insures that sales representatives are not calling on unhappy customers, or can make sure that priority customers receive top notch service by simply checking their status and taking appropriate action if a case is unresolved.

Inside the case management system is also an escalation engine. This allows users to better manage more difficult customer issues. If a customer calls into a call center, or sends an email that cannot be easily addressed by a support agent, they can escalate that service issue to a more qualified agent with the click of the mouse. These escalations can be tracked and measured, which in turn allows call centers to see how many complex calls or emails are coming in to the company. This may prompt staffing changes in the support staff, or signify a more pressing product issue or other support trend that can be addressed before service levels hit critical mass.

EMAILS: GROUP INBOX Print ? Help

EMAIL SEARCH

Email Status: Subject: Contact: Assigned To:

ASSIGNMENT

Assign: Only Checked All Search Results To: Using Rules:

GROUP INBOX

| Selected: 0 Start Previous (1 - 2 of 2) Next End

<input type="checkbox"/>	<input type="text" value="Subject"/>	<input type="text" value="Contacts"/>	<input type="text" value="Related to"/>	<input type="text" value="Reply"/>	<input type="text" value="Assigned"/>	<input type="text" value="Date Sent"/>
<input type="checkbox"/>	<input type="text" value="Sample Email"/>	<input type="text" value="Jason Nassi"/>	<input type="text" value="Create Case"/>	<input type="text" value="Reply"/>	<input type="text" value="SupportInbox"/>	<input type="text" value="2007-04-27 08:09"/>

A major part of the multi-channel case management capabilities in SugarCRM focus on handling large volumes of inbound emails. SugarCRM's email management tools allow support managers to better route inbound emails to the right support agents, using simple workflow tools and business rules. Also, the email management tools automatically attach customer emails to the customer account record, which allows for a more holistic view of customer interactions over time. The email tools also allow users to give priority to certain email types.

In Sugar 5.0, we have added an all new email client. This new feature allows support users to manage all of the inbound email directly inside of SugarCRM. Therefore, agents can handle inbound requests and other support tasks without changing from one application screen to the next. This increases productivity as well as user adoption of the CRM system.

Centralize Knowledge

Part of providing a consistent and satisfying service experience for customers is having the right information available to every support individual. SugarCRM provides users with a central Knowledgebase Module to bet-

Fig 1. Part of the multi-channel support capabilities in SugarCRM include the ability to manage large emails volumes more efficiently using Sugar's inbound email tools.

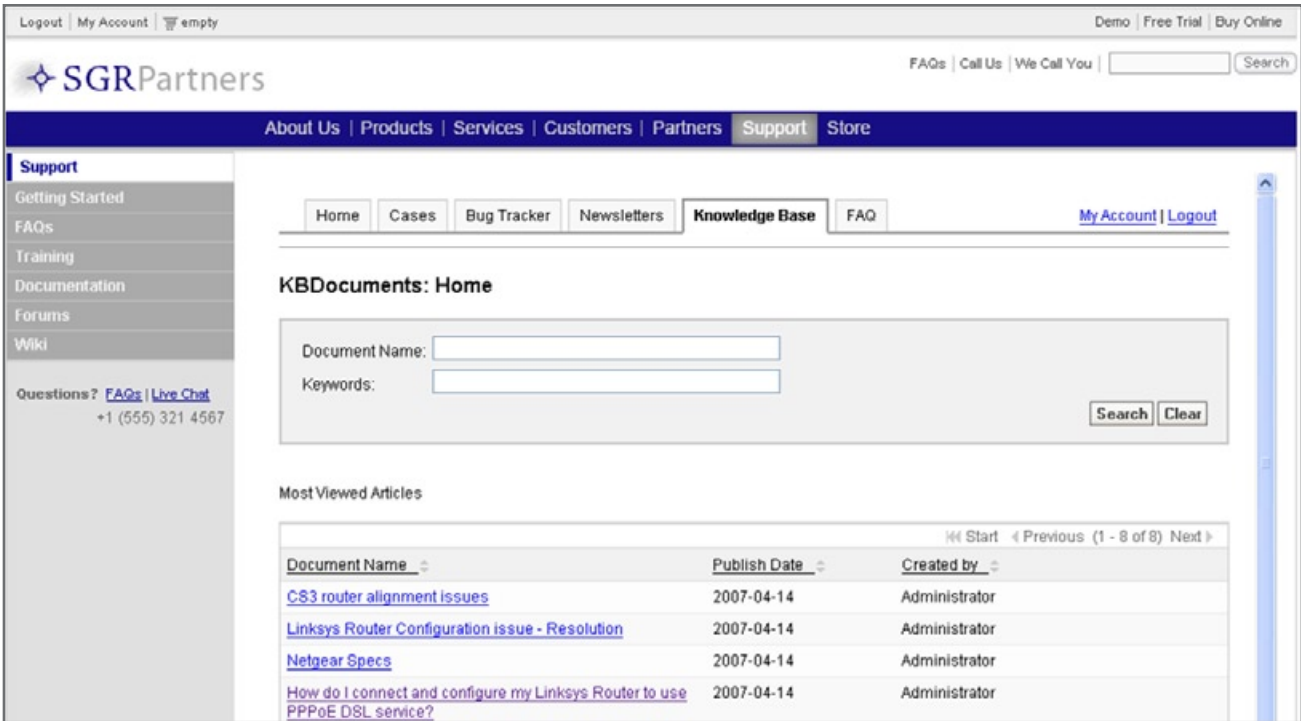


Fig 2. The SugarCRM Knowledgebase Module allows users to create a centralized data repository, which both internal employees and customers can access. Users can search for relevant content simply and quickly. The Knowledgebase can be branded to match your corporate web properties

“Sugar has been an important enhancement to our customer service operations. The state of Kansas is also pleased with the faster and more effective issue resolution we have been delivering since the system was implemented.”

Brent Hoffman
Former Director of Marketing for Kansas.gov; Current General Manager at Nebraska.gov

ter centralize important corporate information. The Knowledgebase can store product information, company data, as well as other articles geared towards supporting customers such as troubleshooting best practices or previous issue resolution processes that have proven most effective.

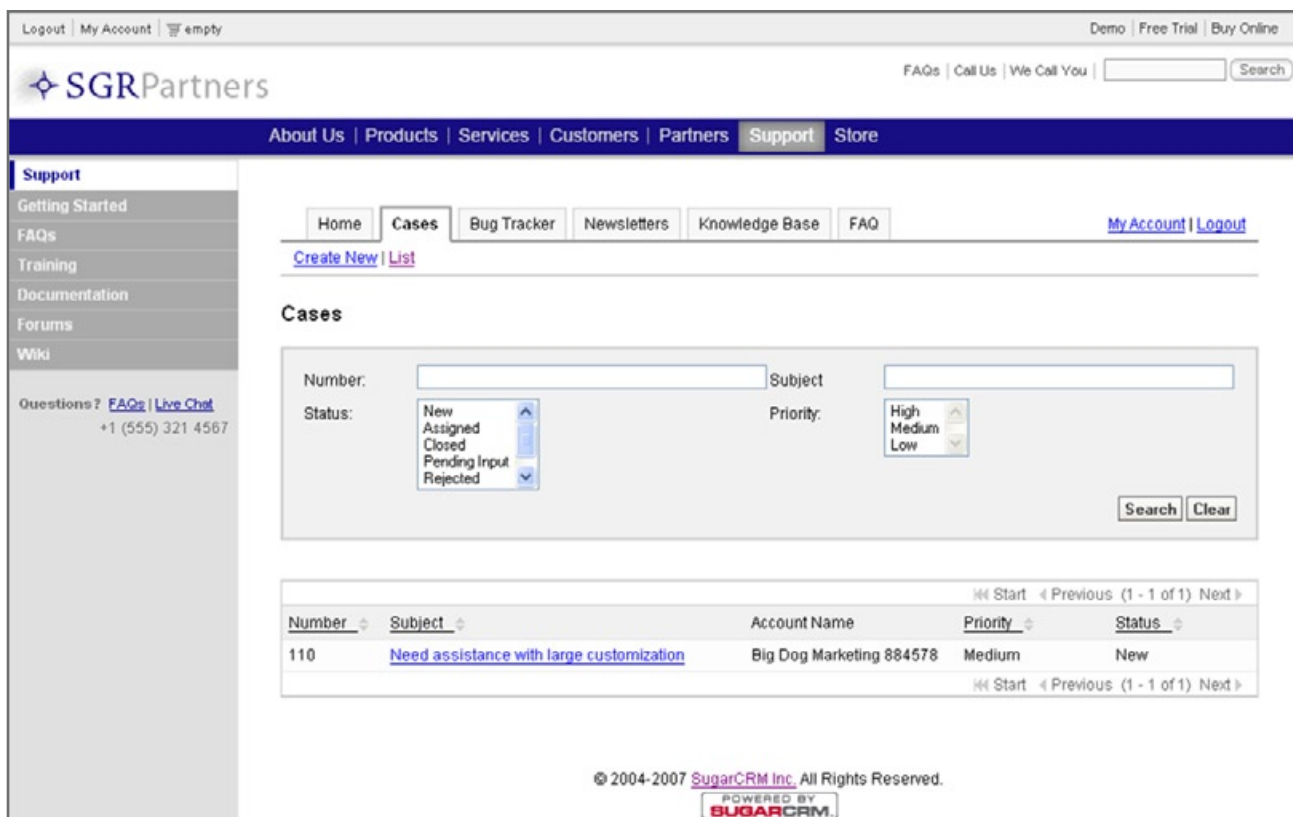
The Knowledgebase Module can also support frequently asked question (FAQ) sheets, that can aid support representatives handle common problems, or the FAQ can be pushed out to users via the web portal (see below). The information stored in the Knowledgebase can be easily accessed by users through full-text search, tagging, categorization and approvals. The interface itself is much like a Wiki, which is easy to navigate for users.

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To better control the data being added to the Knowledgebase, and to insure that all the information that may touch a customer is consistent with corporate messaging, administration rules can be applied. A content staging process can be easily put in place so new material is reviewed by a manager who approves and then posts the content for support agents or customers to access.

Provide Self-Service

Multi-channel customer service can also equal lower cost support. This can be managed through utilizing SugarCRM’s robust Self-Service Portal. This tool allows users to enable their customers to perform tasks traditionally done by agents or other employees, all without picking up a phone. Self-Service Portal provides your customers the ability to log a



new support issue, upload information to their account or access data from the Knowledgebase, and receive status updates on their own support case tickets. Therefore, companies leveraging Self-Service Portal can reduce inbound calls and emails and in turn service more customers without adding head count inside their support organization.

The Portal also allows users to update their own account data if their address or other contact information changes. This allows the CRM system to have the most correct data and reduces data the time, effort and costs associated with data cleansing of the CRM system. The Self-Service Portal can also be used to communicate with customers. For example, a simple to use newsletter subscription management tool is included in the module. And, all of the activities of a customer visiting Self-Service Portal can be tracked in the main Case Management module.

SugarCRM’s Self-Service portal allows users to expose data to customers for use in self-service scenarios. Customers can log new cases, read FAQ sheets, or check case status, without picking up a phone – saving themselves time and saving your organization money.

Gain Visibility into Support Operations

Without gaining a sharp picture of how well your support operation is running, you could be incurring unnecessary costs in staffing and other support resources. SugarCRM offers users strong reporting tools out of the box that provide support managers greater visibility into their operations to help identify trouble areas and other trends that affect support operations.

Fig 3. SugarCRM's Self-Service portal allows users to expose data to customers for use in self-service scenarios. Customers can log new cases, read FAQ sheets, or check case status, without picking up a phone—saving themselves time and saving your organization money.

“With SugarCRM, we have reduced call handling times from two to three minutes down to as little as 20 seconds.”

John Leishman
CEO
Geeks On The Way

Pre-built, easy to use reports roll up data stored in the case Management system and provide insight into case resolutions. Users can drill down into open cases based on such factors as time period, support representatives, priority and entitlement. These reports can determine the effectiveness of certain agents or types of resolution methods. The reports can also identify trouble spots, allowing support managers to prioritize activities by agents accordingly.

The reporting tools in SugarCRM’s support module allow you to gain valuable insight into support activities. For example, this out of the box report indicates the number of new cases logged per month, which can aid in cost-effective agent scheduling and staffing.

The reporting capabilities also allow support staff to rank cases, insuring that the most pressing cases are addressed first. The reports also allow for management of service entitlements, so that customer service meets any and all service level agreements.

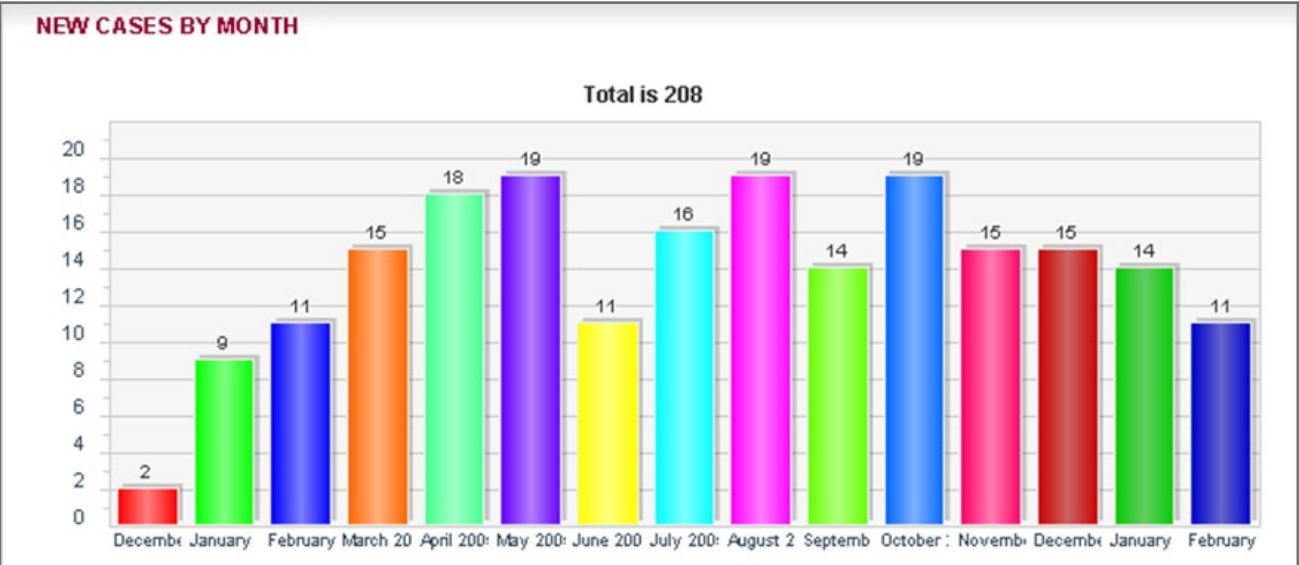


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Conclusions

Supporting customers does not have to be a high cost operation in your business. By utilizing a CRM product like SugarCRM, you can decrease the cost to serve in many ways. By adding more channels of communication, you allow customers to gain information and answers without having to pick up the phone for an expensive support call off the bat. Using the Knowledgebase in SugarCRM allows organizations to centralize knowledge and issue resolution information, which provides for higher first call resolutions, as well as streamlined and more efficient support processes.

Enabling customers to initiate self-service sessions through SugarCRM’s Self-Service Portal can eliminate the need to scale agents in a call center, saving the support organization even more. And the built-in reporting tools in the SugarCRM system allow for even greater savings. With the deep business insight provided, support managers can more effectively and efficiently staff their call centers or other support areas to meet actual inbound volume and eliminate guesswork.



Case Study Snapshot: UZO

UZO is one of Portugal’s leading and fastest growing telecommunications provider. Like most telecommunications firms, UZO depends on providing top-notch service to its customers to insure continued success in the market. UZO quickly realized that its home grown support tools would not handle the volume and complexity of customer requests. Also, the proprietary system was difficult for users to adopt.

“With our rapid growth in addition to typical employee turnover, we were bringing on a lot of new people onto our customer call center team. Unfortunately a lot of our new hires were having issues with the usability of our internal tool,” says Project Manager Jorge Teixeira da Silva.

UZO’s internal solution also made it difficult for customer service representatives to view an account’s complete history. Inbound and outbound call information was separated and viewed only by certain individuals and groups. So, UZO decided to standardize its support operations on SugarCRM. Now, service agents can view all customer information in a single screen, and access important data through the Knowledgebase tools.

UZO has continued its aggressive growth thanks in part to SugarCRM enabling faster and efficient service for customers. And while UZO looks to build its business with new customers, it is also keeping a solid foundation by keeping existing customers satisfied thanks to SugarCRM. Customer retention at UZO remains high, in a market well known for high levels of customer churn.

“Deploying Sugar has helped us collaborate as a team as well as lowered our response times to customer inquiries,” says da Silva. “We are now able to better serve our growing customer base because of Sugar and the processes that we have put in place around Sugar.”



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