

Optimisez vos relations clients avec un outil de CRM performant

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#BizConnect13





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SugarCRM

La société

SugarCRM – la société CRM dotée de la plus forte croissance

Entreprise

- Leader du CRM Open Source
- Créée en avril 2004 à Cupertino, Californie
- Siège européen basé à Munich, bureaux UK, France
- Partenaire mondial IBM

Chiffres clés

- 3ème éditeur de CRM
- La plus grande implémentation CRM (70K utilisateurs mondiaux)
- 1M+ utilisateurs, 80,000+ sociétés
- 11+ Million téléchargement
- 115+ Pays, 25+ langues
- 435+ partenaires sur 5 continents
- 30,000+ développeurs enregistrés

Croissance très rapide

- 112% YoY croissance du CA
- 120% YoY croissance de notre base clients



Leader Position in CRM for
Midmarket - July 2012

Analysts Agree

Gartner

“A cloud-agnostic strategy enables customers to run SugarCRM on a variety of cloud infrastructures such as Amazon, and IBM Cloud.”

“Attractive easy to understand pricing model delivery models.”

“IBM partnership provides improved delivery services and market reach, and for those companies who have adopted an IBM technical stack such as Lotus Notes a CRM option.”

Source: Magic Quadrant for SFA Gartner Inc., July 2012

FORRESTER®

“Key strengths include low application and implementation costs and strong internationalization support, usability, and sales functionality.”

“It offers sound support for mobile CRM.”

“The technical skill sets required to support the application tend to be more widely available than for other CRM solutions, thereby lowering resource support costs.”

Source: Forrester Wave Report, Forrester Research, July 2012

8,000+ clients, partout dans le monde



Sugar

Le CRM

Notre conviction : le CRM Pour Tous



Nous aidons
toute personne
en contact avec
la clientèle à
Mieux travailler.

Notre conviction : l'Open Cloud

**Choix de la
plateforme**

SUGAR PRIVATE CLOUD
Powered by IBM®

**SUGAR on
PUBLIC CLOUD**

SUGAR ON DEMAND



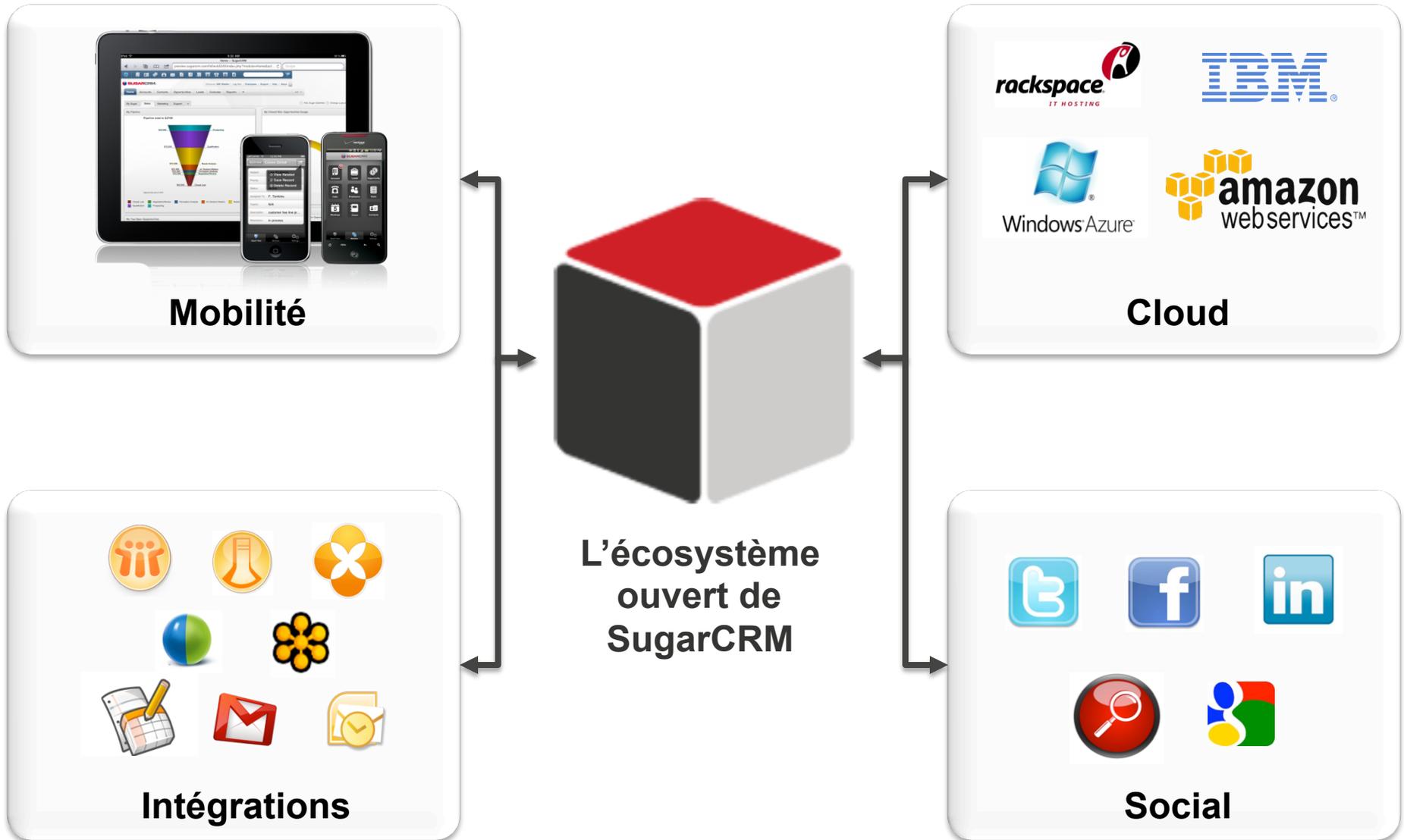
**SUGAR on
PARTNER CLOUD**

SUGAR ON SITE

**Choix du
déploiement**

Choix de l'écosystème

Notre conviction : un Écosystème Ouvert



Un Monde en Mouvement



Gestion des forces de ventes (SFA)



- Personnalisation des étapes du cycle de ventes
- Équipes de ventes
- Prévisions
- Produits, devis, contrats
- Automatisation du processus de ventes

Automatisation des processus Marketing



- Gestion des campagnes
- Capture des prospects sur votre site Internet
- Campagnes emails
- Mesure du retour sur investissement (ROI) d'une campagne

Automatisation du support client



- Gestion des requêtes clients
- Suivi des bugs
- Gestion des emails
- Base de connaissances
- Portail client en libre-service

Les éditions de Sugar



4 éditions commerciales, 1 édition communautaire

SUGAR PROFESSIONAL™

CRM avancé pour petites et moyennes entreprises

\$35/utilisateur/mois

SUGAR ENTERPRISE™

CRM pour les entreprises avec des besoins portail client et rapports avancés

\$60/utilisateur/mois



SUGAR CORPORATE™

CRM avancé pour entreprises avec des besoins en mobilité offline

\$45/utilisateur/mois

SUGAR ULTIMATE™

Offre CRM Ultime pour les entreprises mondiales, mobiles et sociales

\$100/utilisateur/mois

SUGAR COMMUNITY EDITION™

SUGAR CRM™

Intégrations avec des applications tierces

Intégrations avec des applications tierces

Marketo

QlikView

Emailvision

Clicktools

Miller Heiman

SharePoint

InsideView

Pardot

Box.net

Prestashop

Magento

Jaspersoft

EchoSign

DocuSign

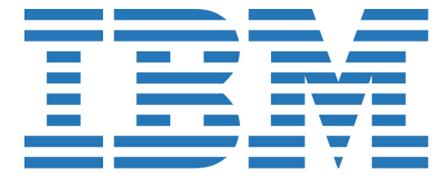
ProcessMaker

BuddyPress

Bureau Van Dijk

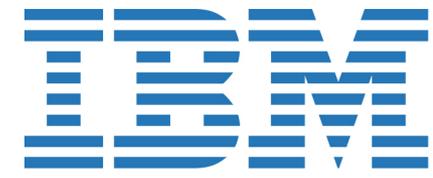
LiveChat

Sugar est le CRM
le mieux intégré avec
les solutions IBM



- Lotus Notes
- Cognos BI
- Unica
- Connections
- CastIron
- DB2
- SmartCloud for Social Business
- SPSS
- Sterling Commerce

Matériel IBM supporté



- System i
- System x
- System p
- IBM PureSystems

Plug in Lotus Notes

- Intégration des emails
 - Attacher un email à un enregistrement
- Calendrier
- Tâches (todo)
- Carnet d'adresses
 - Sync 2 sens

Cognos

Créer et visualiser des rapports et tableaux de bord depuis Sugar

Une forte intégration avec les dashlets

The screenshot displays the SugarCRM user interface. At the top, there is a navigation bar with a search box and the user's name, Anthony Krinsky Administrator. Below this, a dashboard area contains several dashlets. The primary dashlet is titled "Gross Profit for Bella Eyewear Brand : List1". It features a table with columns for Product, Product color, Product name and color, and Gross profit. The data is organized into two regions: Americas and Asia Pacific. To the right of the main dashlet is a "My Activity Stream" dashlet, which shows a list of recent activities, such as "Anthony Krinsky Administrator created a new contact" for various individuals like Max Belton and Stephen Degroat. The bottom of the interface shows a "My Calls" dashlet and a footer with the SugarCRM logo and copyright information.

Product	Product color	Product name and color	Gross profit
Region: Americas			
Bella	Blue	Bella - Blue	\$350,126.77
	Pink	Bella - Pink	\$1,195,307.87
	Silver	Bella - Silver	\$431,840.20
	White	Bella - White	\$1,856,505.35
	Yellow	Bella - Yellow	\$45,223.73
Bella			\$3,879,003.92
Americas			\$3,879,003.92
Region: Asia Pacific			
Bella	Blue	Bella - Blue	\$205,403.86
	Pink	Bella - Pink	\$865,946.86
	Silver	Bella - Silver	\$314,987.99
	White	Bella - White	\$1,321,496.80

Cognos

Analyse des données, production et rapports actifs

Modèle de sécurité de Sugar appliqué

Framework pour Sugar

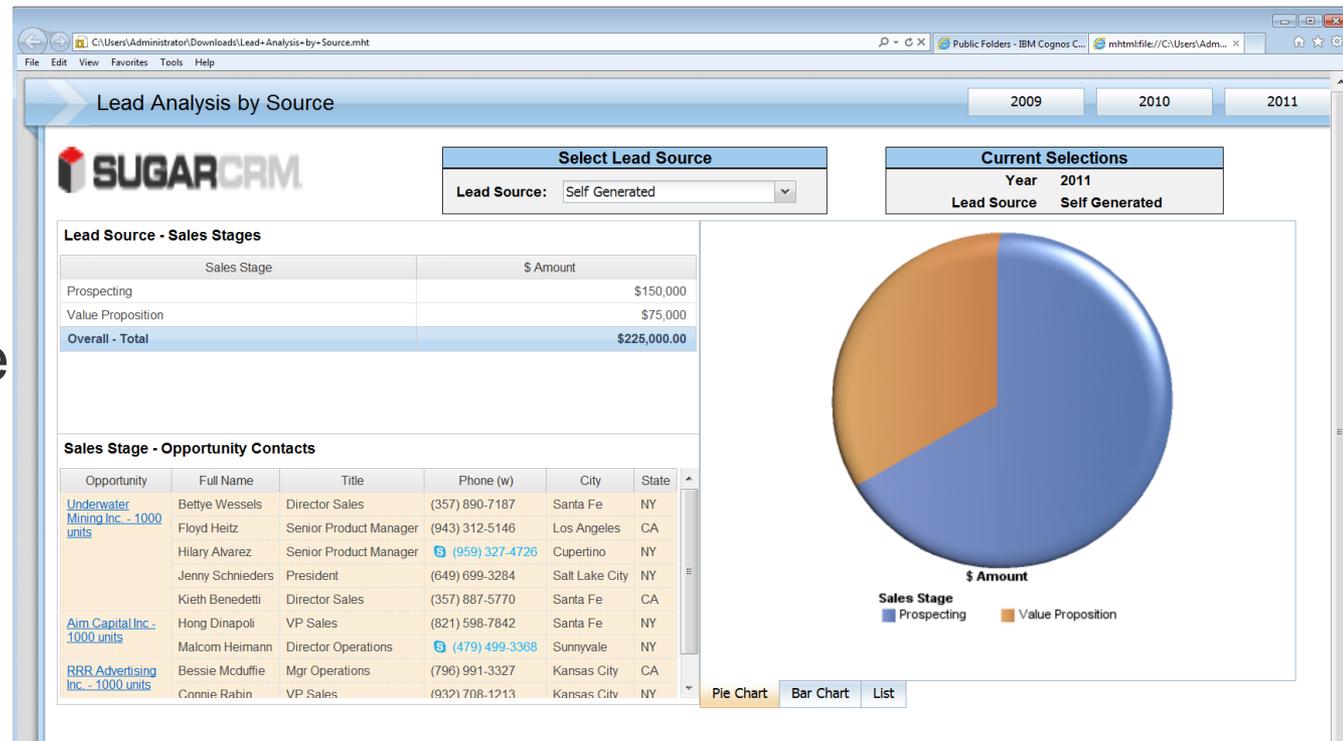


Cognos

Analyse des données, production et rapports actifs

Modèle de
sécurité de
Sugar appliqué

Framework
pour Sugar



Connections

Créer une communauté

The screenshot displays the SugarCRM web interface. At the top, there is a navigation bar with tabs for 'Accounts', 'Contacts', 'Opportunities', and 'More'. A search bar and a user profile for 'Max Jensen' are also visible. The main content area shows a list of opportunities, with one selected: 'Custom Aileron Tube'. A modal dialog box is open, titled 'Please select the community to associate with this object'. The dialog has three tabs: 'My Communities', 'Public Communities', and 'Create Community'. The 'Create Community' tab is active, showing a form to create a new community. The form fields are: 'Community Name' (text input with value 'East Lake Airlines, Custom Aileron'), 'Tags' (text input with value 'east_lake_airlines'), 'Public?' (checkbox, unchecked), 'Members' (text input, empty), and 'Description' (text area, empty). At the bottom of the form are 'Save' and 'Cancel' buttons. The background shows a sidebar with 'Other', 'InsideView', and 'IBM Connect' sections. The bottom status bar shows 'REP: Custom Aileron Tubes', 'In Draft', dates '10/10/2012', and 'Max Jensen'. The SugarCRM logo and copyright notice are at the bottom left, and a help link is at the bottom right.

Connections

Gestion des membres d'une communauté

The screenshot displays the SugarCRM interface. At the top, a navigation bar includes 'Accounts', 'Contacts', 'Opportunities', and 'More'. A search bar and user profile for 'Max Jensen' are also visible. Below the navigation bar, there is an 'Edit' button and a detailed view of an opportunity record.

Opportunity Name:	Custom Aileron Tube	Account Name:	East Lake Airlines
Opportunity Amount: (USD \$):	68,000.00	Expected Close Date:	10/31/2012
Sales Stage:	Value Proposition	Type:	Existing Business
Probability (%):	30	Lead Source:	Existing Customer
Next Step:	Generate Proposal	Campaign:	
Description:	East Lake is looking to replace the aileron tubes on their fleet of Gulfstream V's. They have custom part requirements and a tight delivery schedule.		

Below the opportunity record, there is a section for 'Other' and a sub-section for 'IBM Connections'. The 'Members' tab is active, showing a list of community members. The first member listed is 'Max Jensen (owner)', with the last update timestamp of '10/10/2012 09:22pm'. Navigation controls for the member list include 'Select Community', 'Add Member', and pagination for '(Page 1 of 1)'. The footer of the interface includes the SugarCRM logo, copyright information for 2012, and a help link for 'Opportunities Help'. A taskbar at the bottom shows several open image files: sarah.gif, chris.gif, will.gif, gv.jpeg, and max.gif, along with a 'Show All' button.

Connections

Gestion des fichiers

The screenshot shows the SugarCRM interface for a user named Max Jensen. The main navigation bar includes 'Accounts', 'Contacts', 'Opportunities', and 'More'. The current page is titled 'IBM Connections' and shows a file named 'RFP Custom Aileron Tube.docx' uploaded by Charles Hicks on 10/10/2012 at 09:14pm. Below the file, there is a 'History' section with a table showing one record: 'RFP: Custom Aileron Tubes' in 'In Draft' status, assigned to Max Jensen, with a creation and modification date of 10/10/2012 at 08:43pm. An 'Activities' section below it is currently empty, showing 'No Data'.

Custom Aileron Tube » Op: ✕

ibm-connections.sugarcrmdemo.com/index.php?action=ajaxui#ajaxUILoc=index.php%3Fmodule%3DOpportunities%26action%3DDetailView%26record%3D6d9a4c78-a6... ☆ ☰

Accounts Contacts Opportunities More Search Max Jensen +

Other

IBM Connections ^

Files Members

Select Community New File (Page 1 of 1)

[RFP Custom Aileron Tube.docx](#)
Charles Hicks | Last Updated: 10/10/2012 09:14pm

^ History

Create Note or Attachment (1 - 1 of 1)

Subject	Status	Contact	Date Modified	Date Created	Assigned User	
✉ RFP: Custom Aileron Tubes	In Draft		10/10/2012 08:43pm	10/10/2012 08:43pm	Max Jensen	edit

^ Activities

Create Task (0 - 0 of 0)

Subject	Status	Contact	Due Date	Assigned User
No Data				

SUGARCRM © 2012 SugarCRM Inc. Opportunities Help

Unica fonctionnalités

Campaign interactions logged in SugarCRM

SugarCRM presents offers from Interact

Leads

Create

Lead sourced from Unica

Name	Referred By	Lead Source	Phone	Email	Lead Source Description	Assigned User	
Mack Abbott		Unica Campaign	147-396-9585 x83412	abbott.mack@nicolaspadberg.info	Mack carries a Mortgage Insurance Policy with us, but does not have related policies.	Hugh Gleichner	edit

Bi-directional event triggers in SugarCRM and Unica

Policy Offers

Policy	Description
<input type="checkbox"/> Home Owners	Broad coverage for damage to your house and any permanent structures on your property (unless the cause of the damage is specifically excluded in your policy.) Damage to your personal property due to causes specified in your policy. Limited coverage which is available for items like stolen jewelry. Coverage amounts vary depending on your state of residence.
<input type="checkbox"/> Flood	Nationwide, only 20% of Americans' homes at risk for floods are covered by flood insurance. Most private insurers do not insure against the peril of flood due to the prevalence of adverse selection, which is the purchase of insurance by persons most affected by the specific peril of flood. In traditional insurance, insurers use the economic law of large numbers to charge a relatively small fee to large numbers of policyholders who have suffered a loss.
<input type="checkbox"/> Earthquake	Every offer of earthquake insurance must provide coverage for your dwelling, for your personal property (not less than \$5,000 or 10% of the covered dwelling loss), and for any additional living expense (ALE) of at least \$1,500. You may waive ALE coverage if you or your family do not occupy the dwelling you wish to insure. CIC Section 10089(b) states that the maximum deductible that can be charged is 15% of the policy dwelling limit. It is common for the deductible to be the maximum 15%.

Unica intégrations

- **Campagne**

- Read/Write to SugarCRM DB with UDI
- Use Campaign triggers for SugarCRM Updates, or custom integration cases
- Can write directly to SugarCRM DB, perform Webservice calls, or generate flat files for batch processing
- Use Workflows, Scheduler, Logic Hooks in SugarCRM to trigger events in Campaign

- **Interact**

- Leverage Interact and External Callout API's from SugarCRM

Websphere Cast Iron

Connects Hybrid World of Cloud and On Premise Applications in Days



Démonstration



Merci !
Q & R



Contact



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