

# SugarCRM and IBM: transforming customer relationships

*A flexible and dynamically scalable solution that transforms customer relationship management with easy access to all critical information, unified collaboration and the ability to adapt to any business*



## Highlights:

- Enables unified access to previously disparate sources of customer information
- Empowers customer-facing teams to collaborate in any way necessary
- Provides the flexibility and agility to adapt to any organization, process or service model
- Scales easily with organizations as customer relationships thrive
- Drives consistent, efficient customer engagements
- Integrates with world-class computing platforms and software from IBM

Every industry understands the pervasive challenges of customer relationship management (CRM). While virtually every department interacts with customers, the information these interactions generate remains hidden from every other department. When teams operate inefficiently and without a complete picture of the customer's needs, they jeopardize customer satisfaction, loyalty and quality of experience.

Traditional CRM applications run the gamut from unscalable, narrowly focused point solutions to inflexible, monolithic legacy systems. Modern CRM platforms provide more versatility but very few offer an open architecture for easy integration, comprehensive tools for automation and enterprise-wide collaboration, source code access or a wide range of deployment options.

IBM and SugarCRM are bringing a new kind of CRM solution to market. This solution places the customer at the center, unifies access to all of the customer's details through an intuitive interface and enables organizations to collaborate more effectively — all of which helps optimize marketing, sales and service.

## Solution Overview

Customers can tell immediately when they are not the focus of an organization's operations. They are not recognized instantly across all channels. Their needs are not anticipated. Their history with the company is not acknowledged from one interaction to the next.

IBM and SugarCRM are changing how organizations approach CRM. The solution these two industry leaders offer redefines what it means to create a customer-centric experience. It is part of a larger initiative called IBM Smarter Commerce, which helps companies across many industries better manage the value chain — including buy, market, sell and service processes — through a customer-centered approach that helps increase revenue and loyalty.



As part of the Smarter Commerce portfolio, this solution brings together world-class computing platforms and software from IBM with Sugar, a superior CRM platform from SugarCRM. Together, these components enable organizations in virtually any market — from insurance, banking and automotive to retail and consumer packaged goods — to replace inflexible, closed, legacy CRM systems with a modern, open solution that has the flexibility and scalability to keep pace with the organization's growth, evolving needs and changing customer demographics.

The best customer data in the world is useless if the right people do not have access to it exactly when they need it. This solution is designed so that every customer-facing person — whether in sales, marketing, service or any other department — can always find the high-quality customer information they need to engage customers, carry on a meaningful, rewarding conversation and meet the customer's needs more completely and effectively.

Sugar is an extremely powerful yet very user-friendly CRM platform. It includes all of the functionality required to support sophisticated customer-facing initiatives, and it features an intuitive user interface that helps teams become proficient quickly with very little training. This unified interface gives users access to any customer's order history, service and support calls, and even their social media interactions — a complete, 360-degree view of the relationship — all in the same place, regardless of where that information originated in the organization.

With Sugar, users can manage accounts, contacts and opportunities. It enables users to access opportunity, contact and account data from any desktop or mobile device. This makes it easier to understand customers' mindsets before engaging them. It allows users to spend less time searching for relevant details and more time building customer relationships. It also decreases response time to customer questions, improving the overall customer experience.

What IBM brings to the solution is a comprehensive portfolio of advanced software applications that extend the Sugar platform, enabling high-quality collaboration, integration and flexibility of deployment.

IBM Connections drives enterprise-wide engagement, so users of Sugar can share customer-specific expertise among individuals, groups and departments. Connections makes it possible for users to quickly identify subject matter experts who have experience with a customer, then collaborate with them through instant web conferences. The same application can be used to establish project milestones and collectively revise RFPs and other documents.

IBM Interact uses powerful, behavioral targeting analytics and marketer-defined business logic to deliver the optimal marketing message during every customer interaction. Integration with the Sugar platform allows users to map out inbound marketing strategies that incorporate a variety of customer details. IBM Interact also uses self-learning and arbitration to determine the right offer to present to customers.

Beyond this, IBM software combines with Sugar to help businesses identify the most profitable opportunities, determine optimal sales quotas for territories through compensation analysis, and to understand which products in the portfolio will appeal to which customers.

IBM also provides the world-class computing platforms and infrastructure that enable the Sugar platform to be deployed in virtually any configuration — so that the CRM implementation and critical customer data can be hosted on-site or in the cloud. The result is a high-powered CRM solution that can be adapted to the specific needs of any organization, regardless of its size or the complexity of its operations.

Because of the relationship between IBM Global Business Services (GBS) and SugarCRM, businesses can acquire all of these technologies from a single, expert source. Even more important, IBM GBS specializes in helping businesses map out the next phase of their evolution — and then implement the solutions required to make the transformation real.

## **Solution Benefits**

Fully aligned with the Smarter Commerce initiative, IBM and SugarCRM deliver a proven solution for optimized CRM that enables organizations in many vertical markets to:

- **Strengthen customer relationships** — Together, IBM and SugarCRM help businesses anticipate customer behavior and develop evaluation criteria based on deeper customer insights. With this knowledge, businesses can offer products and services that align with customer preferences. The ability to access customer information easily and collaborate with everyone who knows the customer also helps ensure a seamless and satisfying experience across the full range of channels and touch points.

- **Grow across channels** — This solution enables social CRM, driving leads and sales based on information gathered from customers with a similar social media profile. The solution can also proactively deliver the right information to customers at the right time to move them toward evaluation and purchase.
- **Achieve adaptability** — This solution provides exceptional flexibility and configurability of both capabilities and deployment. It can be configured to match the way businesses already work, so users can take full advantage of the software's capabilities without changing existing sales, support or customer engagement processes.

### SugarCRM and IBM: a closer look

The strength of the solution comes from integrating the CRM capabilities of the SugarCRM software with an extensive array of advanced applications from IBM, including:

- **IBM Unica® Campaign** — This software allows organizations to target thousands — or millions — of individuals with the right message by quickly and cost-effectively designing, executing and measuring customer-driven communication strategies across every channel.
- **IBM Unica Interact** — With IBM Unica Interact, marketers can personalize in realtime the experience of customers interacting with websites, call centers and other inbound marketing channels.

- **IBM Connections** — IBM Connections is the leading social software platform that enables organizations to engage the right people, drive innovation and deliver results. It is an integrated and secure platform that helps people engage with networks of experts in the context of critical business processes in order to anticipate and respond to emerging opportunities.
- **IBM Cognos® Business Intelligence** — This software provides a wide range of functionality to help organizations understand their own data. It helps monitor and measure how companies are performing with business intelligence capabilities such as scorecards, dashboards, reports and realtime monitoring.
- **IBM SmartCloud for Social Business** — This managed, co-branded software-as-a-service (SaaS) offering has a complete suite of social applications, including e-mail and calendar, collaboration and IM, web meetings and document sharing.
- **IBM WebSphere® Cast Iron Cloud Integration** — This suite of tools enables organizations to complete cloud integration projects in days and achieve higher return on investment in SaaS and cloud models. Reusable process templates and a “configuration, not coding” approach create a simplified cloud integration experience that reduces integration costs, frees up scarce resources and maximizes cloud user productivity.

### SugarCRM and IBM Smarter Commerce Alignment



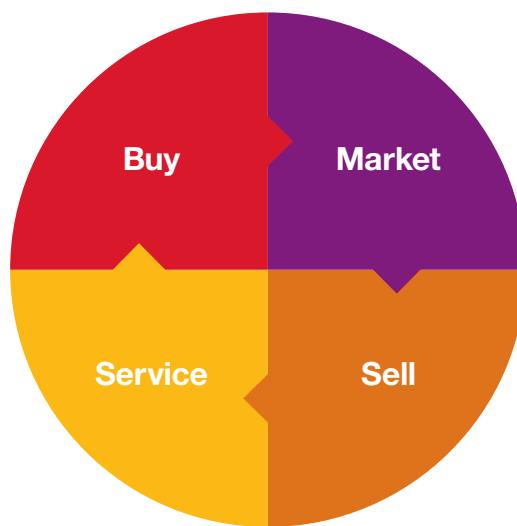
Optimizes management of accounts, contacts, activities and suppliers



Creates, executes and tracks campaigns across multiple channels.



Customer activity/data patterns and usage history improves existing customer satisfaction



Leverages the power of the collective enterprise to accelerate and close business

The solution from SugarCRM and IBM transforms CRM, bringing it into the realm of Smarter Commerce. It equips customer-facing professionals with the relevant information and tools they need to effectively collaborate and engage with customers within and beyond the enterprise.

- **IBM PureSystems™** — The innovative IBM PureSystems compute platform provides a pre-integrated and optimized hardware/storage configuration, which facilitates deployment according to predefined patterns to satisfy demanding requirements for scalability, availability and resiliency. This results in a much lower total cost of ownership (TCO) and lower risk of configuration and operation errors.
- **IBM SmartCloud Enterprise** — This managed white-label infrastructure-as-a-service (IaaS) offering enables organizations to consume infrastructure in a dynamic, pay-as-you-go model that expands and contracts as needed and dramatically reduces cost and resource depletion.

## SugarCRM and IBM: effective engagement

### SugarCRM

SugarCRM democratizes customer engagement, empowering every professional who interacts with the customer to excel at their job. SugarCRM applications have been downloaded more than 11 million times and currently help more than one million end users across disciplines effectively engage their customers. More than 7,000 organizations have chosen SugarCRM's on-site and cloud computing subscription services over proprietary alternatives. SugarCRM has been recognized for its customer success and product innovation by CRM Magazine, InfoWorld and Customer Interaction Solutions.

### IBM

IBM Smarter Commerce integrates industry-leading capabilities and offerings from its software, services and systems portfolio to help organizations increase the value they generate for their customers, partners and shareholders. Smarter Commerce integrates and transforms how companies manage and adapt their buy, market, sell, fulfill and service processes, putting the customer at the center of the value chain. It increases differentiation, customer loyalty, revenue and margin growth.

### For more information

To learn more about the IBM approach to Smarter Commerce, contact your IBM sales rep or visit:  
[ibm.com/smarterplanet/commerce](http://ibm.com/smarterplanet/commerce)

To learn more about SugarCRM, please visit:  
[www.sugarcrm.com](http://www.sugarcrm.com)



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