



# How Technology can Help You Deliver a Great Customer Experience

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July 21

# Before We Start



**Everyone is  
on mute**



**Questions  
are welcome**



**Recording  
available**

# Presenters



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# Agenda

- Customer Experience (CX) - What does it really mean?
- Examples of Organisations Who Practice Great CX
- Cloud Technology: The CX Enabler & Imperative for Change
- Breaking Down The Barriers to the Cloud
- Q&A





# **Customer Experience (CX) - What does it really mean?**



# Customer experience leaders take off

Out-perform the market by 40%

Grow faster and are more profitable

80% more likely to retain customers

Benefit from much higher customer spending (up to 140% higher)

**70+%**

# ROI



**Companies that lead their fields  
on experience do the following  
things well...**

# Clear answers about the big questions

**(Really) get to know your customers**

**Experience, data, tech...  
in that order**

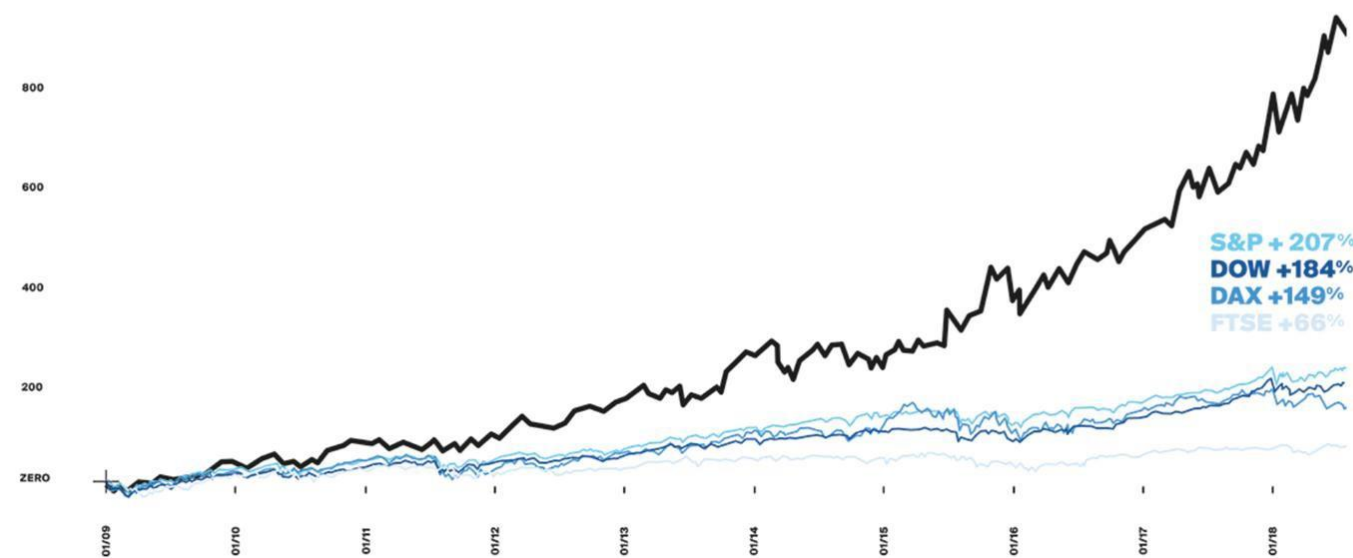
**They understand what the basics are  
for their customers and then ensure  
that they are brilliant at them**

**They consistently and continuously  
identify and remove grit from their  
customer's experience**

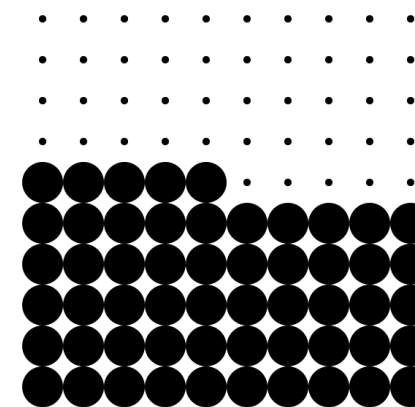
**They are proactive by nature  
because they know that reactive  
customer service is no longer  
good enough**

# Simplicity Leaders

**+830%**



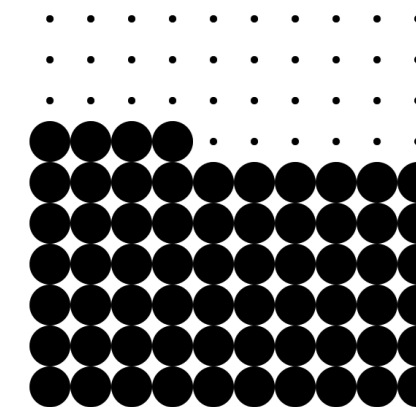
**55%**



**Premium**

The percentage of consumers willing to pay more for simpler experiences.

**64%**



**Loyalty**

The percentage of consumers who are more likely to recommend a brand because it provides simpler experiences and communications.

## A simpler experience pays



**‘Employee’ experience matters just  
as much:  $CX = f(EX)$**

**They understand that over 90% of loyalty is earned at or around the point of purchase and when something goes wrong**

**They personalize everything  
about their experience, not just  
their marketing, and they do it in  
a non ‘creepy’ way.**

1. They are clear on their experience strategy and how it connects to business objectives
2. They really know their customers
3. They take an experience, data, tech...ordered approach
4. They are brilliant at the basics
5. They are relentless at the identification and removal of 'grit'
6. They are proactive by nature
7. They make things as simple as possible - inside and out
8. They understand where loyalty is earned
9. They personalize everything about their experience, not just their marketing.



# Examples of Organisations Who Practice Great CX



**Cortech**  
Developments





# **Cloud Technology: The CX Enabler & Imperative for Change**

# **The Electric Car.....Why?**

**Expensive to buy**

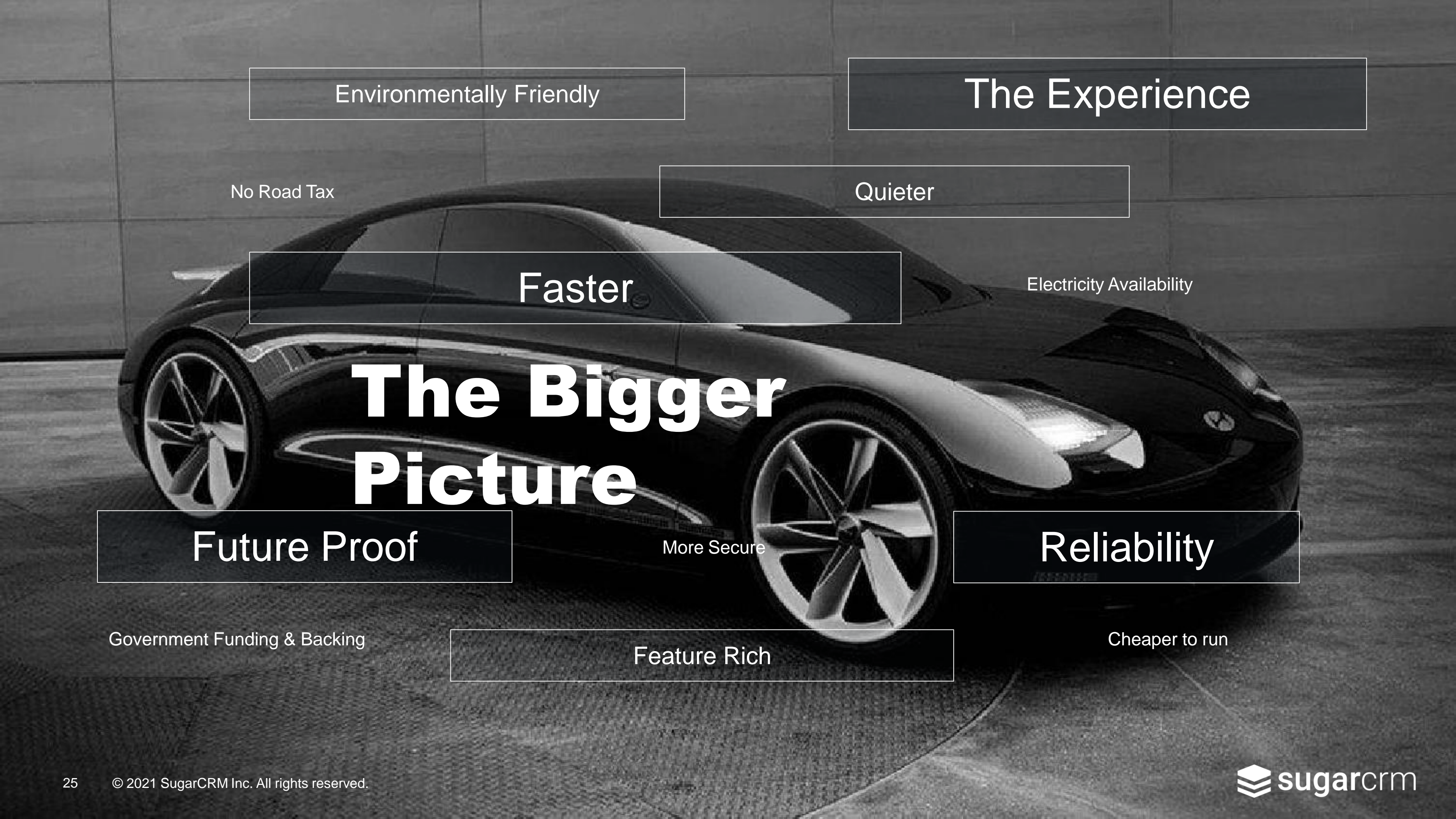
**Takes Longer to Fill**

**Has Less Range**

**Does exactly the Same thing**

**But.... we will all expect to be driving one**





Environmentally Friendly

The Experience

No Road Tax

Quieter

Faster

Electricity Availability

# The Bigger Picture

Future Proof

More Secure

Reliability

Government Funding & Backing

Feature Rich

Cheaper to run

# Drawing Parallels



# SugarCloud The Bigger Picture

Reliable

Universally Available

Feature Rich

No Maintenance

Cheaper to Run

Secure

Future Proofed

Up to Date

Compliant

Faster

Scalable

The Experience

# What is SugarCloud?



# Customer Experience – Service

Cases by Status

Filter **Build Filter** Search by subject, number...

New	Assigned	Closed	Pending Input	Rejected	Duplicate
Internet Streaming Videos St... XYZ Funding Inc High	I Can't Modify the Volume of ... XYZ Funding Inc Low	Manage Volume and Brightn... XYZ Funding Inc Low	I Can't Modify the Volume of ... X-Sell Holdings Low	Can't Find the Clock on My S... XYZ Funding Inc High	My TV Won't Connect to the I... XYZ Funding Inc High
My TV Won't Connect to the I... XYZ Funding Inc Medium	Can't use other apps while pl... XYZ Funding Inc Low	How to turn off the beeping ... X-Sell Holdings Medium	Can't Find the Clock on My S... X-Sell Holdings Low	Internet Streaming Videos St... X-Sell Holdings Low	Error 7654 appears on TV w... XYZ Funding Inc High
Internet Connection Drops ... XYZ Funding Inc High	I Can't Modify the Volume of ... XYZ Funding Inc High	My TV Won't Connect to the I... X-Sell Holdings High	Can't Find the Clock on My S... White Cross Co Low	Error: 2134, 2100, 5628, 654... X-Sell Holdings Medium	Use Push Button Feature to ... XYZ Funding Inc Medium
Use Push Button Feature to ... X-Sell Holdings Low	The TV volume cannot be m... XYZ Funding Inc High	Network Error or Can't Acces... Waverly Trading House Low	The TV volume cannot be m... White Cross Co Medium	I Can't Modify White Cross Co High	
Internet Connection Drops ... X-Sell Holdings High	Use Push Button Feature to ... White Cross Co Medium	Can't use other apps while pl... Waverly Trading House Medium	Internet Streaming Videos St... White Cross Co Low	Network Error White Cross Co Low	
Error: 2134, 2100, 5628, 654... X-Sell Holdings Low	Can't use other apps while pl... White Cross Co Medium	The TV volume cannot be m... Waverly Trading House Low	Error 7654 appears on TV w... Waverly Trading House Medium	Can't Access t... Union Bank Low	
My TV Won't Connect to the I... White Cross Co Low	Can't Find the Clock on My S... White Cross Co Medium	I Can't Modify the Volume of ... Union Bank High	My TV Won't Connect to the I... Union Bank Low	I Can't Play M... Union Bank High	

Online Knowledge Search & Portal User Management  
 SLA Response Management  
 Change Timers  
 Workforce Management



# Customer Experience – Service

Service Console

Overview Cases **12**

### My Open Cases by Followup Date

Followup Date	Open Cases
2021-06-11	2
2021-06-12	4
2021-06-13	6

### My Open Cases by Status

Status	Count
Pending Input	6
Assigned	4
New	2

### Open Cases by User by Status

### Planned Activities

Today Future

2 Meetings 3 Calls

- Introduce all players (Melissa Evans, 24 days ago) - Overdue
- Follow-up on proposal (Melissa Evans, 24 days ago) - Overdue

### My Recently Viewed Cases

### My Cases Resolved this Month by Week

Week	Cases Resolved
W24 2021	12

### Active Tasks

7 Due Now 10+ Upcoming 1 To Do

- Get demo feedback (Melissa Evans, 24 days ago) - Overdue
- Setup evaluation (Melissa Evans, 23 days ago) - Overdue

### My Cases in the Last Week by Status

### Status of Open Tasks Assigned by Me

Status	Count
Not Started	64

Not Started	In Progress	Completed	Pending Input	Deferred
<p>Ship product Linda Payne Can't Find the Clock on My Smart Spea...</p>	<p>Check with engineering team I Can't Modify the Volume of My Smart ... 2022-01-07 06:15</p>	<p>Check ERP to replace hardw... Can't Find the Clock on My Smart Spea... 2021-05-05 08:45</p>	<p>Reproduce the issue I Can't Modify the Volume of My Smart ... 2022-01-31 13:30</p>	<p>Reproduce the issue Error 7654 appears on TV when accessi... 2022-01-31 13:30</p>
<p>Get demo feedback Virginia Pierce How to turn off the beeping sound to ... 2021-06-14 14:23</p>	<p>Assemble catalogs Dennis Rice XYZ Funding Inc 2022-04-07 18:45</p>	<p>Call to schedule meeting Margaret Lawrence XYZ Funding Inc 2021-06-02 14:30</p>	<p>Check with engineering team Can't Find the Clock on My Smart Spea... 2021-11-18 13:45</p>	<p>Check ERP to replace hardw... Can't use other apps while playing mus... 2022-02-21 09:30</p>
<p>Send a follow-up letter Jacob Sims Internet Connection Drops While Watc... 2021-06-15 01:23</p>	<p>Check with engineering team Use Push Button Feature to Connect to... 2022-01-17 06:30</p>	<p>Check ERP to replace hardw... Can't use other apps while playing mus... 2021-06-14 12:30</p>	<p>Reproduce the issue My TV Won't Connect to the Internet. R... 2021-06-14 11:00</p>	<p>Check customer support sub... Internet Streaming Videos Stop, Pause, ... 2022-03-08 10:45</p>
<p>Send a follow-up letter William Boyd I Can't Play Music on My Google Play. R... 2021-06-15 01:23</p>	<p>Check ERP to replace hardw... Internet Connection Drops While Watc... 2022-03-18 18:45</p>	<p>Check customer support sub... Internet Streaming Videos Stop, Pause, ... 2021-03-08 12:30</p>	<p>Check ERP to replace hardw... Error 7654 appears on TV when accessi... 2022-04-15 14:15</p>	<p>Check with engineering team The TV volume cannot be modified. Re... 2022-02-17 17:45</p>
<p>Setup evaluation</p>	<p>Check customer support sub... Internet Connection Drops While Watc... 2021-12-06 10:30</p>	<p>Reproduce the issue Internet Connection Drops While Watc... 2021-05-24 12:15</p>	<p>Check ERP to replace hardw... Error: 2134, 2100, 5628, 6548 or 9087 A... 2021-11-02 09:30</p>	<p>Verify customer email (boun... Internet Connection Drops While Watc... 2021-07-28 07:45</p>

# Customer Experience – Sales

Renewals Console

Stage/Status	Name/Account Name	Expected Close Date	Worst   Likely   Best	Lead Source	Next Step
Prospecting In Progress	JKM Corp (HA) - \$4637 - New - 216 Units JKM Corp (HA)	11 days ago 2021-06-26	\$6,769	Web Site	
Qualification In Progress	JKM Corp (HA) - \$1945 - New - 161 Units JKM Corp (HA)	8 days ago 2021-06-29	\$7,920	Web Site	
Value Proposition In Progress	JKM Corp (HA) - \$4223 - New - 123 Units JKM Corp (HA)	in 12 days 2021-07-19	\$3,558	Cold Call	
Perception Analysis In Progress	JKM Corp (HA) - \$6828 - New - 219 Units JKM Corp (HA)	in 17 days 2021-07-24	\$30,...	Partner	

Renewals Console

Overview Accounts Opportunities

Planned Activities

Today Future

10+ Meetings

10+ Calls

Discuss pricing  
Jim Brennan, 24 days ago

Demo

More meetings...

Pipeline

Select...

Negotiation/Review Perception Analysis Id. Decision Makers Value Proposition Needs Analysis Qualification Prospecting

Qualification \$12,575 (4)  
Needs Analysis \$5,785 (2)  
Perception Analysis \$9,750 (4)  
Negotiation/Review \$3,621 (2)

Prospecting \$48,497 (8)

Opportunities by Time Opportunities by Sales Stage

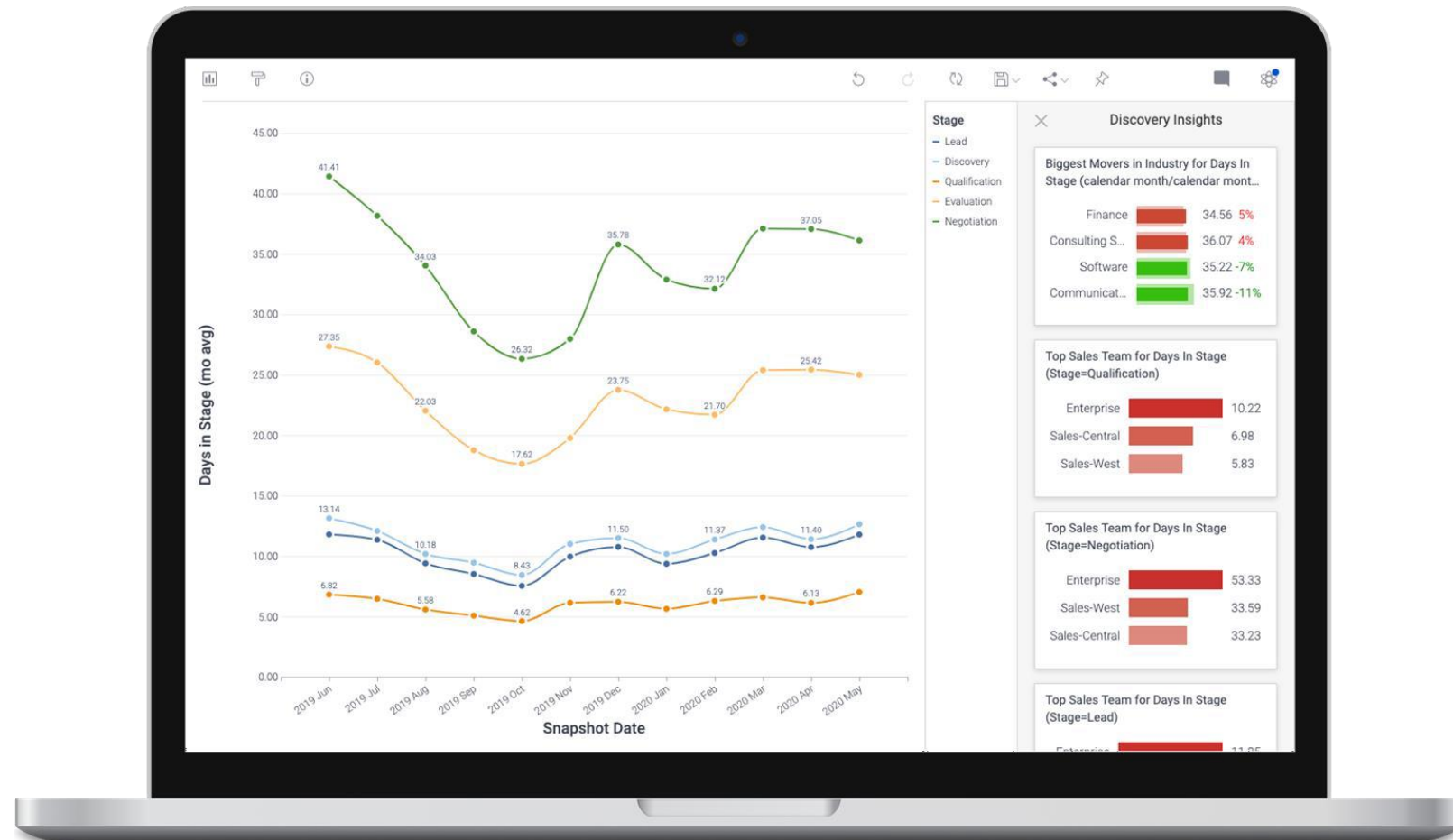
Filter Build Filter Search by opportunity name...

July 2021	August 2021	September 2021	October 2021	November 2021	December 2021
Smith & Sons - \$2200 - New - ... Smith & Sons 2021-07-25 \$4,051.00	Airline Maintenance Co - \$67... Airline Maintenance Co 2021-08-23 \$6,178.00	White Cross Co - \$2088 - Ne... White Cross Co 2021-09-19 \$11,261.11	Cloud Cover Trust - \$4290 - ... Cloud Cover Trust 2021-10-31 \$15,280.00	Nelson Inc - \$4485 - New - 2... Nelson Inc 2021-10-31 \$9,865.00	Southern Realty - \$2398 - Ne... Southern Realty 2021-11-14 \$13,590.00
JKM Corp (HA) - \$4223 - New ... JKM Corp (HA) 2021-07-19 \$3,558.89	SuperG Tech - \$3943 - New - ... SuperG Tech 2021-08-22 \$5,004.44	Super Star Holdings Inc - \$29... Super Star Holdings Inc 2021-09-27 \$4,648.89		Nelson Inc - \$4447 - New - 9... Nelson Inc 2021-11-14 \$3,321.11	P Piper & Sons - \$1457 - New... P Piper & Sons 2021-12-21 \$31,235.00
JKM Corp (HA) - \$6828 - New ... JKM Corp (HA) 2021-07-24 \$30,384.00	Max Holdings Ltd - \$4304 - N... Max Holdings Ltd 2021-08-25 \$24,728.89			JKM Corp (HA) - \$3900 - New ... JKM Corp (HA) 2021-11-30 \$6,038.00	Avery Software Co - \$4278 - ... Avery Software Co 2021-12-18 \$0.00

# A New Level of Visibility

Powerful Business Intelligence and Analysis with the unique ability to reveal trends over time

## Sugar Discover





# Why Does it Matter?

- The bigger picture
- A robust, reliable and scalable foundation to support business growth
- Invest resource in your Customer Experience – not in maintaining system & Infrastructure
- Save \$\$'s beyond onsite hosting
- Remain competitive with value only the cloud can bring
- Alignment with the way the world is moving
- Become more Secure & Compliant
- Use migration as catalyst for change

**Optimise  
Customer  
Experience !**

# SugarCloud

## The Complete CX Toolkit



*“We chose Sugar because it was the best combination of features and functionality, and customizability that we found in the market. It also really helped us by going with an on-demand [cloud] solution so we didn’t have to manage the operations of the tool itself but could instead focus on building the right processes for our team.”*

**Peter Tew**, Senior Product Manager



# **Breaking Down The Barriers to the Cloud**



# Buy In



- The bigger picture
- Understanding why
- Bring along for the Journey
- Cost of Change Vs Cost of Not
- Change happens

**Gartner**

*“Cloud computing is firmly established as the new normal for enterprise IT. Across industries, cloud continues to be one of the fastest-growing segments of IT spend.”*

# Security, Privacy & Reliability

## Certification

- Sugar SOC 2 TYPE 2 independently audited
- AWS SOC 2 & ISO27001

## Security

- Network and application firewall
- Authentication - SSO/SAML engine or Sugar IDM
- 24/7 intrusion detection
- Vulnerability management
- Encryption in motion and at rest
- Security incident handling

## Data

- Data Held in Europe or UK and does not leave
- DPA Agreement
- Controlled access & logging for Sugar Ops

## Availability

- 99.999% uptime in Europe 2020
- Performance monitoring and optimization
- Managed disaster recovery

## Processing Integrity


- Quality assurance
- Process monitoring



*Powered by AWS worldwide*

# Complex Environment

- Complex definition
  - Customisations
  - Integrations
  - Workflows
- Reviewed early in the process – Discovery
- Cloud scanning tools
- Incompatibilities identified
- Remediation activities proposed




*“The only thing that held us back from doing it any earlier was we thought our customizations would be more difficult to migrate. If I’d known it was that easy, I would have done it earlier.”*

**Steve Thompson,**  
Expert Networking Group Ltd



# Q&A

**We're here to  
make the hard  
things easier.**

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AMAZE YOUR  
CUSTOMERS  
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EFFORTLESS  
EXPERIENCES**

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# Thank You!





| **Let the platform do the work**

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