



# S is for Sell

Security, Scalability, and Sales  
Benefit of SugarCRM's Sales Force  
Automation Platform





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# A CRM Choice is More than “Sales Software”

Understandably, businesses want the best technology. People are looking for the best and the most efficient—both personally and in business. Some believe that names or brands are everything. But most people realize that just because a name or brand is recognized, it doesn't mean it's the best solution.





With a plethora of CRM choices, finding one that fits your organizational goals now and your vision for the future can be daunting. Importantly, at SugarCRM, we realize there are choices everywhere, and we want you to choose the best system for your company. Here is what you need to consider from a technology perspective when choosing your next CRM.

When you select a new CRM system for your internal sales team, it's imperative the downtime is minimal. Change in any part of business is difficult. But for many companies, determining what the sales team wants is the extent of the evaluation of a tool. Choosing a platform means not only ensuring it will meet the sales team's needs, but also integrating with other key business technology, like your marketing automation platform, financial software, and inventory management systems.

## But That's Not All

Due diligence requires looking at more than your current in-house systems; you need to evaluate a CRM from a technical standpoint for now and in the future, including scalability, security, and the more technical aspects of your sales pipeline. Yes, a CRM system needs to be useful to the sales team; however, it's really only a small part of this business-critical system. Evaluating a sales force automation solution like Sugar Sell should focus on these key aspects to make sure you are prepared for today and ready for tomorrow.



# Scalability

If your company wants to move forward, it focuses on growth. Whether that means additional customers, expanded product offerings, adding to employee headcount, or a combination, you need a platform that can scale with you. It's essential to implement a technology strategy that encompasses the planned growth of your company. Technology is meant to be adaptable, which is exactly what you want in a CRM solution. A good solution provides a way forward without interrupting your business, processes, and platform availability at scale, with a consistent customer experience that you can count on.



You may think that adding licenses to your CRM platform should be as easy as calling your vendor, but depending on the vendor, that may not be the case. Many companies use a tiered structure, reflecting your storage limits, API calls, and total number of licenses allowed in a CRM product. Normally, this is standard business practice, but taking a closer look, it can be dependent on the number of licenses in your tier. For additional users, cloud storage limits, and API calls, you may be limited in how you can scale without a new contract.

### **If it's not your contract that's limiting, it might be the platform**

If it's not your contract that's limiting, it might be the platform. Many CRM providers use clouds maintained on proprietary technology that limits data transfers. Vendors use this tactic to lock customers into their solution, making it prohibitive in both cost and effort to transfer data among competitor products. This can thwart a company's

cloud migration strategy, not only from one vendor to another, but from on-premise instances to cloud. It's essential to understand the transferability of your essential CRM data when it comes to the technology used in their cloud data storage and limitations. Products like [Sugar Sell](#), which is powered by [SugarCloud](#), utilizes the infrastructure provided by Amazon Aurora to allow customers to scale data and licensing as needed. As a leading cloud provider, Amazon Web Services offers the basic framework for SugarCloud and the flexibility to ensure data integrity throughout your Sell instance and easily migratable data should you decide Sugar is not the right fit for your company.

The other limitation that often comes with scalability is storage within the CRM instance. Just as on-premise instances are limited to the amount of space installed within the system, cloud customers are limited to a certain data allotment provided in the base licensing agreement.

## **Storage Within the CRM Instance**

The storage that comes with an instance is dependent on the purchased tier and the number of users. But the standard allocation of storage per contract, without additional data purchase, ranges from 10 to 15GB. For those looking to store detailed attachments and documentation, this is simply not enough. They are forced to purchase additional storage on their platform at a premium, from \$9.99 per month per GB to \$30,000 per year for an additional 10GB of storage, a large budget expansion for small and medium businesses. With Sugar Sell, instances come with 60GB of data storage on the cloud platform, effectively quadrupling the availability compared to other platforms. While customers do have the ability to scale and expand their storage within their Sell instance as needed, there's no pressure if you don't need more storage—a great savings for budget-conscious CIOs and internal IT teams.



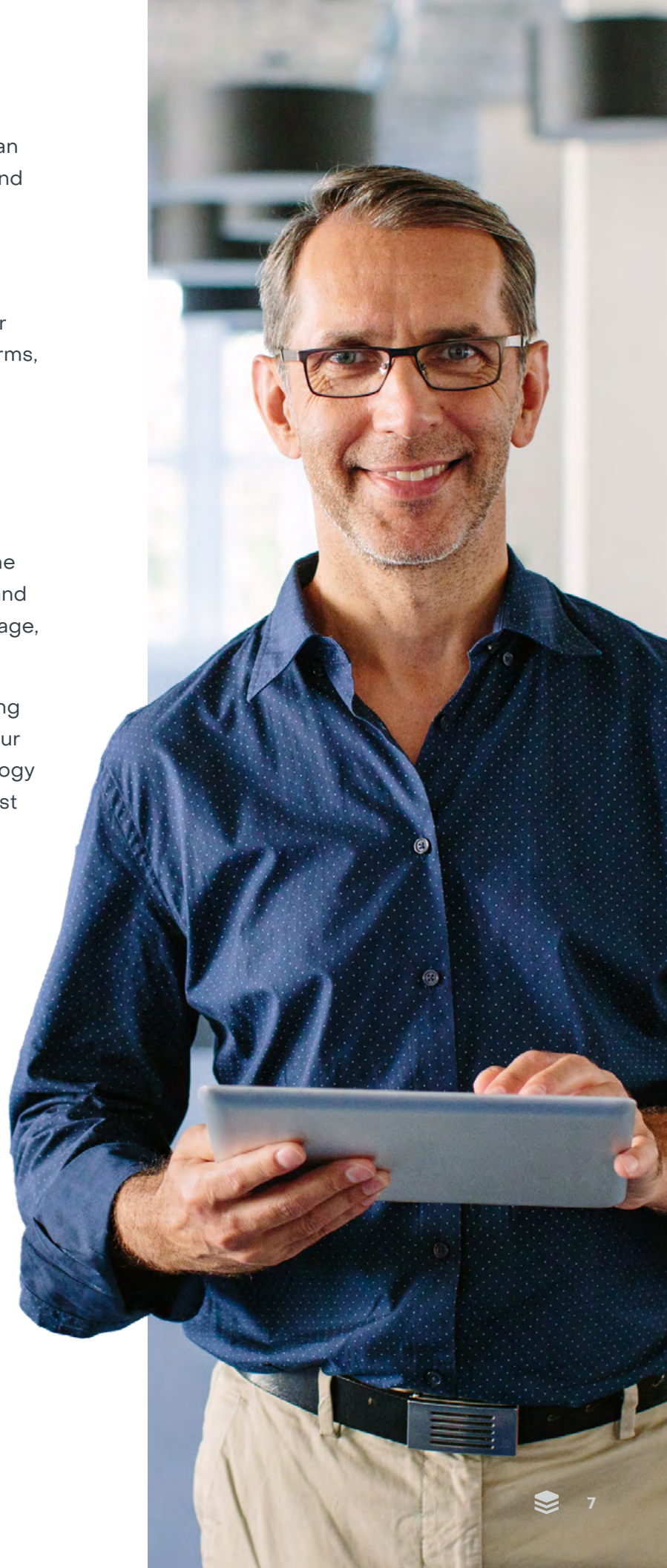
Your CRM technology needs to support your company growth. To determine if and how you can scale within your platform, you need to understand what your contract contains regarding tiers and storage. Ask CRM vendors what happens if your licensing and storage grow rapidly.

Use your internal growth targets to estimate your technology usage expansion for essential platforms, like CRMs.

### **Your CRM technology needs to support your company growth.**

During your engagement with vendors, determine what an increase would mean for your contract and how easy it is to add additional licenses and storage, and if it will affect your current agreement.

You're in a precarious position, potentially delaying business growth, if you don't understand how your CRM can scale within your organization. Technology should not stand in the way of your growth; it must be able to scale alongside your company and support it seamlessly.



# Security

Considering these scalability and storage factors, we need to talk about the security features enabled within the Sugar platform. Security is paramount for any business technology, and it should provide peace of mind, regardless of your vertical. You don't want to become one of those companies making headlines for data breaches. With a CRM, security is as customizable as the software, with built-in standards that enhance and protect your customer data and internal infrastructure.





## A Secure CRM Requires a Secure Connection

With Sugar, that connection begins with a secure HTTP (HTTPS) connection—a requirement that allows the system to maintain secure transport from SugarCRM and for updates as needed. After that, security can be adapted or passed through an endpoint and taken from there by IT teams. System administrators can utilize Apache web server modules to configure their own layer of security. This allows system administrators to define the regulations of their platforms and adhere to strict industry guidelines. Built to withstand cross-side scripting in Sugar customizations, users can customize and follow best practices, using Handlebar templates or JavaScript methods to further secure their systems based on their needs.

The best security methods include role management and user authentication. Internal system administrators and security experts determine the versatility of security in this area, avoiding the need to limit CRM choice based solely on security features. The ability to layer security into Sugar Sell is part of what makes the platform perfect for IT teams who use strict security protocols to prevent malicious attacks from compromising sensitive data.

The first tool in any network security is password management. Built to enforce passwords based on customer requirements, Sugar's password-

enforcement mechanism allows network administrators and security teams to control the requirements for passwords, including strength requirements, password expiration timelines, failed login attempts, and automatic single-use system-generated passwords. Layered together, these features allow IT leaders to control the security of their technology. To provide further support for customers on some SugarCloud products, [identity management](#) offers enhanced protection in the cloud services console.

## Protect Against Bot Infiltration

System administrators understand that system security does not always fail due to user error; instead there are bots that relentlessly attack and breach systems. Once again, Sugar provides ways to protect from bot infiltration—CAPTCHA and Honeybot. While both effectively manage system intrusion, Honeybot adds an additional layer of security that is unobtrusive to end-users but effective against bots.

The most useful security aspect in Sugar is often employed by many organizations—external authentication. Sugar can be configured to accept Lightweight Directory Access Protocol authentication and/or Security Assertion Markup Language for single sign-on if it's required by the organization. These options are configurable in the admin console of Sugar through both on-premise systems and identity management in cloud solutions. By facilitating directory services integration, Sugar supports the centralized management of passwords and integrates seamlessly into your current security ecosystem.

## Where Flexibility Meets Security

The flexibility Sugar solutions provide to track and control security is unique and empowering. Through the strictest base standards, Sugar provides system administrators the tools to work within their own ecosystem to create an optimal environment based on their security standards. With Sugar, you get the tools you need, basic or complex, without layers of coding and workarounds to surpass the system-integrated features. System administrators are in control with Sugar solutions, providing both the peace of mind and flexibility needed to secure sensitive data and customer details.





# Sales Pipeline

What you spend on a CRM system is an investment directly in your business growth and customer retention. Companies increasingly rely on CRM to help nurture customer relationships and gain insights into their sales pipeline. It's telling that 91% of organizations with over 10 employees use a CRM, with 64.2% of organizations believing that a CRM has a direct correlation to their bottom line. Undoubtedly, a CRM is a smart investment for businesses of all sizes, but that doesn't mean any investment in a system is always worth it.

Controlling CRM costs is not only prudent but necessary for your organization, so you can invest in other business-optimization technology like marketing automation or customer service software—which can enhance your customer experience strategy and increase business profitability.

While people wonder how much to invest in CRM technology, it's not the only important consideration for sales force optimization. According to leading industry research, investment in a CRM platform can provide a return on investment from \$2.50 to \$5.60 for each dollar spent. That's a great return, but just as important is that sales representatives believe that a CRM improves their day-to-day

activities. With a set workflow, 50% of sales teams report that it improves their productivity, and 74% of businesses report that a CRM has improved customer relationships.

These benefits are alluring, but they are the results; the reason a CRM enables a better pipeline behind the scenes is far more interesting. A CRM is more than a catalog of customer data; it's a fully functioning way to improve your business' bottom line and customer experience. CRMs enable teams to standardize workflows and buyers' journeys, improve productivity, and manage customer relationships. These factors together create an optimal customer experience, boosting customer retention rates and satisfaction.





## Standardized Workflows

Process is extremely important, not just in sales but in a business in general. A CRM is both a general business investment and a technology investment; IT teams can identify and implement workflows that directly benefit the pipeline and customers. Working with sales leaders, the standardization of workflows in the CRM allows IT to limit system and human error, correctly route deals among teams, and increase the accuracy of reporting for the company. Tools like Sugar BPM with Sell allow you to mold and measure processes among teams and effectively customize the workflows unique to your organization.



## Buyer's Journey

Another way to standardize is to label and define the buyer's journey within your organization. Every organization follows a basic journey, but the best buyer's journey is tailored directly to your company. Understanding the triggers and cadences specific to your sales process increases your ability to make the journey effortless for customers and eliminate possible delays. A buyer's journey influences not only your marketing but your organization; understanding which leads are better qualified than others allows you to eliminate time wasted prospecting customers who aren't interested.



## Improved Productivity

Currently, sales representatives **spend only 54% of their time** actually selling. What are they doing? Administrative tasks, like entering data into a CRM. The right CRM solution can alleviate this with data import through databases and automatic integrations with key software components. But not all vendors offer this. It's essential to empower sales teams to take care of customers, not data. This is why Sugar Sell wins with no-touch information management, freeing up time to improve relationships—what a CRM is all about. Overall, a CRM increases productivity, and **teams who use one outperform** teams who don't. The critical component here is to have it sync with communication tools and databases to make it successful for your sales workflow.



## Customer Relationship Management

This is why the CRM was invented—its namesake. The problem comes when employees don't have a way to track interactions with customers and record fine details that could increase closing rates. Sure, companies could use a central set of spreadsheets, email, and documentation, but that leads to additional confusion and more stress on the company's internal infrastructure IT teams must maintain. By streamlining communication records, account details, and other critical customer data, organizations can create pleasant experiences for customers when they buy or renew contracts.

## Streamline Your Workflow, Rather Than Detract From It

The investment you make in it directly correlates to your top- and bottom-line benefits; however, it also directly impacts non-customer-facing teams. IT teams need to see a sound return on the technological investment and the time it takes to maintain the system, all while it links departments throughout the company from legal to accounting to marketing.

Considering the investment of time and effort into a CRM, make sure the pipeline benefits exceed the total cost of ownership for the product, both in terms of price tag and talent. This is where technology leaders prove that it's benefiting the business rather than becoming a headache to sustain a workflow in a broken CRM system.

Just as your customers want an effortless experience when buying from you, you should expect the same when implementing your CRM. The truth is that implementing a CRM for the first time or switching to a new one allows you to carefully evaluate your processes to optimize and amend as needed. With [54% of sales representatives](#) struggling to find leads on their own, a CRM adds an additional level to sourcing leads by using a combination of relationship management and the buyer's journey, ultimately aiding the sales pipeline and company growth.



# Making CRM as Easy as ABC with Sugar Sell

When choosing a technology for your business, the details are important. These details not only matter for today but will have a continuing impact on your organization. Look at this as a solution rather than just a technology. That's what a true CRM should be—a complete solution enabling you to effortlessly manage relationships with customers and increase your insight. This solution must be backed by the ability to scale, maintain security, and support your sales pipeline, both in terms of workflow and order management. Your CRM should also be easy to deploy and use. Your system needs to accelerate its time to value, so you don't miss a beat in your customer conversations while adopting a new platform.





## A User-Friendly Experience From Start to Finish

Out of the box, [Sugar Sell](#) accelerates your time to value and provides a return on your investment. This speed is achieved through Sugar's commitment to your experience as a customer. With [extensive guides](#) and the ability to easily [import your data](#), we walk you through setting up your system and make sure you have the tools you need to succeed. It's not only part of the onboarding process of the Sell platform, but core to who we are at Sugar with our [lifetime customer commitment](#). Investment in a comprehensive CRM system like Sell can provide up to [\\$8.71 per dollar invested](#), making it critical to your top- and bottom-line revenue. Sell is a part of Sugar's unique customer-experience platform designed to provide you with a high-definition view of customers. It radically impacts the way you work with customers through enhanced insights, streamlined integrations and marketing automation, and customer service technology that complements your CRM.



# Click Less, Sell More

Learn what SugarCRM can unlock within your organization.  
A better solution is just a click away.

GET DEMO



## ABOUT SUGAR SELL

Close deals with ease using Sugar Sell, the world's most intelligent CRM. Track and monitor activities, map each customer's journey, and automate as many workflows as you need to. With Sell, you can let the platform do the work.

[www.sugarcrm.com/solutions/sugar-sell/](http://www.sugarcrm.com/solutions/sugar-sell/)

## About SugarCRM

SugarCRM is how marketing, sales, and service teams finally get a clear picture of each customer to help businesses reach new levels of performance and predictability. Sugar is the CRM platform that makes the hard things easier.

Thousands of companies in over 120 countries rely on Sugar to achieve high-definition CX by letting the platform do the work. Headquartered in Silicon Valley, Sugar is backed by Accel-KKR.

To learn more visit [www.sugarcrm.com](http://www.sugarcrm.com) or follow [@SugarCRM](https://twitter.com/SugarCRM).