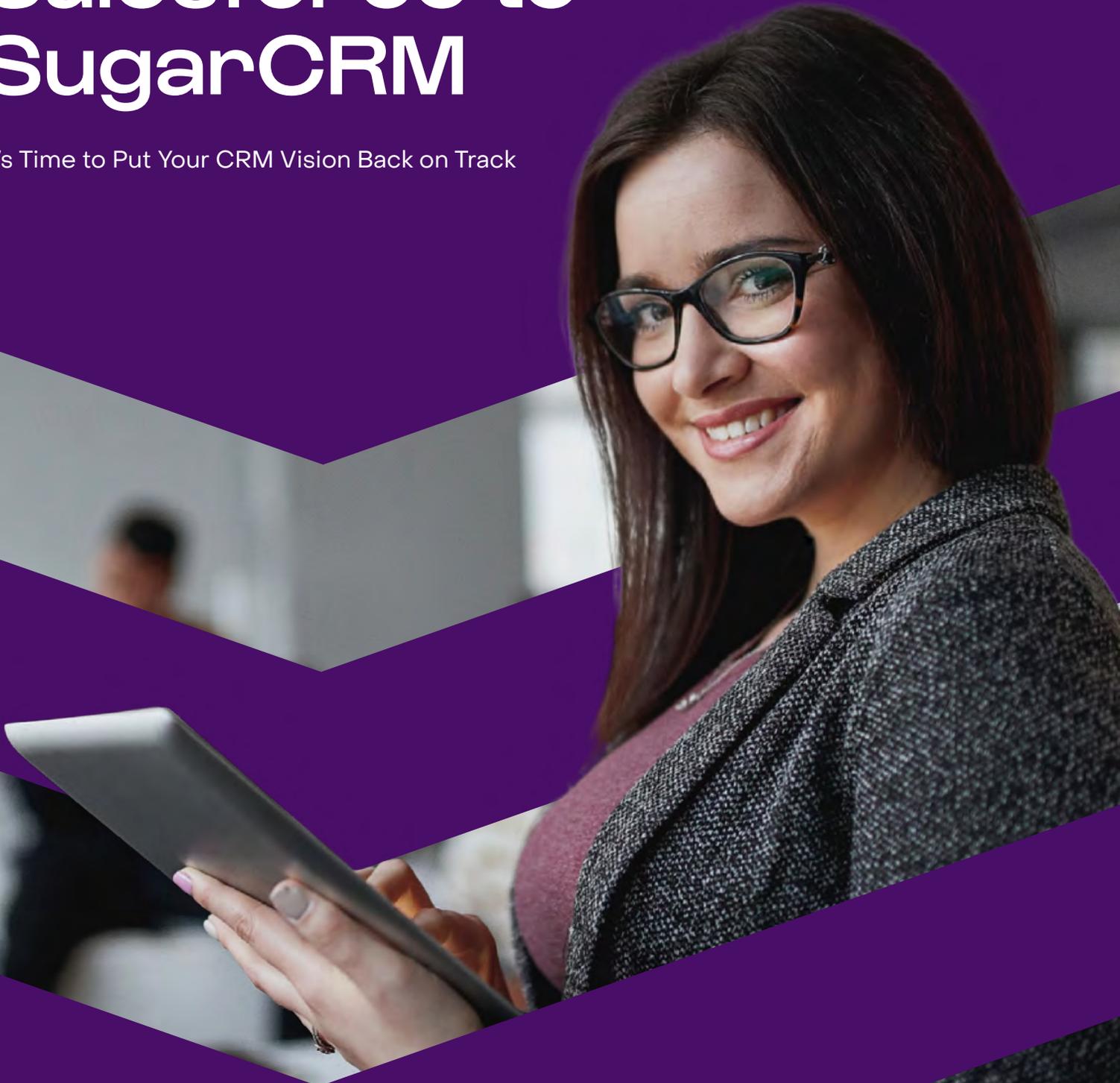


Switching from Salesforce to SugarCRM

It's Time to Put Your CRM Vision Back on Track

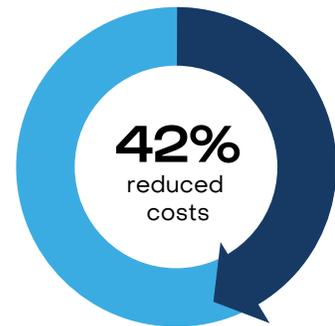
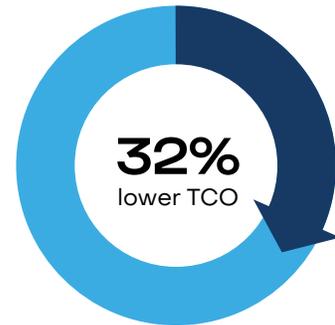


Stuck in Neutral – Where You Are Now with Salesforce

Whether you're a head of sales or marketing, an IT leader, or a CEO trying to build a customer-first enterprise, there's a reason you bought CRM software. You had a business case, a dream, a vision of how CRM could supercharge your entire business, and you had high expectations of bringing that vision quickly to life.

But if you've invested in the Salesforce ecosystem, you have likely been unable to achieve that dream. You've allocated huge budgets, faced daunting complexity and a clunky interface, struggled with endless rounds of configuring business rules and getting the system fully up and running, and had difficulty getting teams to use all the functionality you've implemented.

In other words, you may be feeling like you're not getting the return on your Salesforce investment you were expecting. And that's a tough spot to be in. Salesforce may even try to convince you that you can't afford to change because of how complex it might be for users and the reality of change resistance. They'll try to have you throw more money and resources at the problem, but that's not a realistic option for most mid-sized companies. You might also face the dilemma of being in a long-term Salesforce contract. You feel you're in too deep, and just stuck in neutral.



“Sugar offers a 32% lower total cost of ownership (TCO) and 42% reduced costs for implementation compared with Salesforce.”

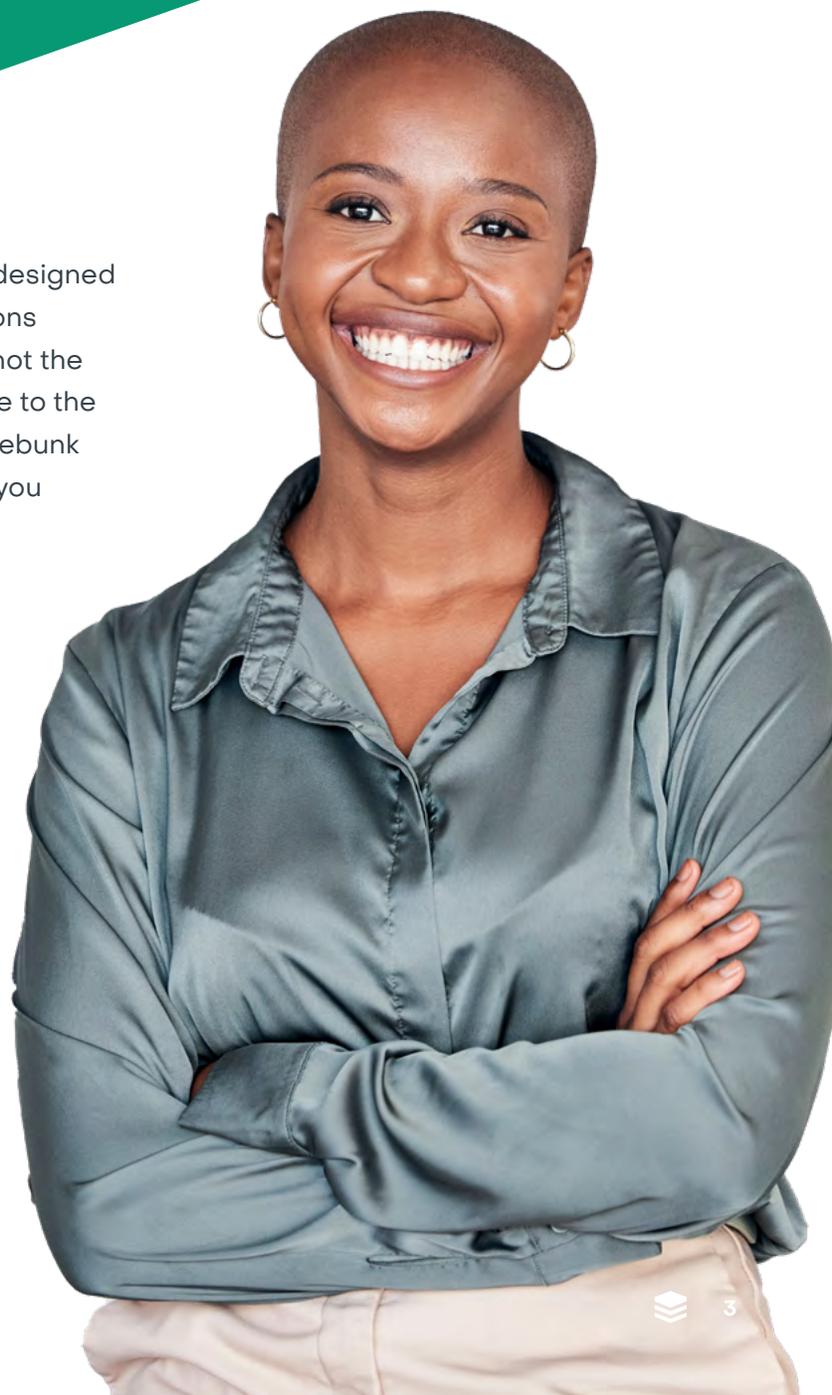
– NUCLEUS – ANATOMY OF A DECISION, SUGARCRM VS. SALESFORCE (2023)

What Sugar Can Do for You

We're here to show you the way forward. Sugar was designed for, and continues to empower, mid-sized organizations that want their CRM to work the way they need it to, not the other way around. Our first role in helping you migrate to the Sugar platform is to demystify your challenges and debunk the myths that keep you mired in inaction. Whatever you have invested with Salesforce, Sugar can find a more effective and less expensive way forward.

Our team's core capability is to uncover what your original goals were with CRM. We commit to digging deep to examine your use of Salesforce and gather key challenges and data points during our discovery process. We'll ask the right questions, identify the vision you're trying to achieve, where the roadblocks lie, and figure out how to get together.

“Whatever you have invested with Salesforce, Sugar can find a more effective and less expensive way forward.”



Often, a lack of understanding of day-to-day user behavior and insights makes it difficult to manage your CRM investment optimally. Maybe:



Field teams are just not logging critical information into the system.



No one knows when revenue is coming into the business or can predict how things will look in the next month or quarter.



You can't get reps to use their mobile app, a fundamental piece that can't be understated.



Unnecessary customizations are bogging down your ability to convert.



You don't understand what each team is up to and can't adequately manage performance.

If you can't get a user to change their behavior to get the job done right, all that added complexity will only get in your way.

“One of the best CRMs out there... It has a very crisp and beautiful UI, which perfectly fits the product and doesn't have a lot of learning attached to it.”

— ETI B., CIMPLYFIVE, G2 REVIEW COMMENT



Our Unique Discovery Process

We'll first look at how you're currently using Salesforce so we can understand exactly where you are, how to get unstuck from Salesforce, and what your future needs to look like.

1

We first investigate your system, its unique rules, processes and data.

2

We then document that data, analyze it, filter it, remove old data, and map it all to elements in Sugar. No data is ever lost.

3

Then we will examine the data and show you clearly what it will look like in Sugar. And we'll do it for you quickly – in days, not weeks.

Phase 1: Data Migration – See Your Data in Action

The starting point for any CRM migration project is data. Most organizations have a justified fear that the migration of their critical data will be a complex, risky and unpredictable endeavor. There is a lot at stake, not the least of which is your ability to run vital sales, marketing and service workflows that all rely on the integrity of your data.

That's why Sugar has made a significant investment in a Migration Service to make the switch to our platform easier and faster. We'll help you:



Set up a fully visualized preview environment so you can see first-hand the retained integrity of your data and how it will all look on the Sugar platform.



Show you how easy it is to fix your layouts in a simple drag-and-drop exercise.



Use our pre-built templates to improve how your data is visualized, accessed and brought to life. You'll see that it's a much easier process than you might expect.



Identify what the most important features, screens and capabilities are for each of your stakeholder groups in sales, marketing and service.



No turn-off/turn-on moment, offering full synchronization of the two services to ensure everything is working before canceling Salesforce.

With this critical first data migration phase, we'll show you that one of your biggest perceived risks – preserving your data – is quite solvable. That assurance will help put your mind at ease for further conversations on how the full migration of your CRM system will work. We'll show you a different way of thinking about CRM.

Sugar Makes CRM More Accessible

Your CRM shouldn't be complex, something your people are unwilling or unable to use every day. If you can make every interaction with your CRM more intuitive and easily accessible, your sales, marketing and service teams will be more inclined to step up and adopt it because, frankly, they want to. Sugar enables you to:



Use drag-and-drop UI configuration and simple reporting and dashboards to make CRM more accessible.



Deliver a "one tab to success" view that replaces multiple open tabs and provides a faster 360-degree view of customer information.



Rely on a mobile interface that's easy to customize and simple to add vital information on each account right after a client meeting.



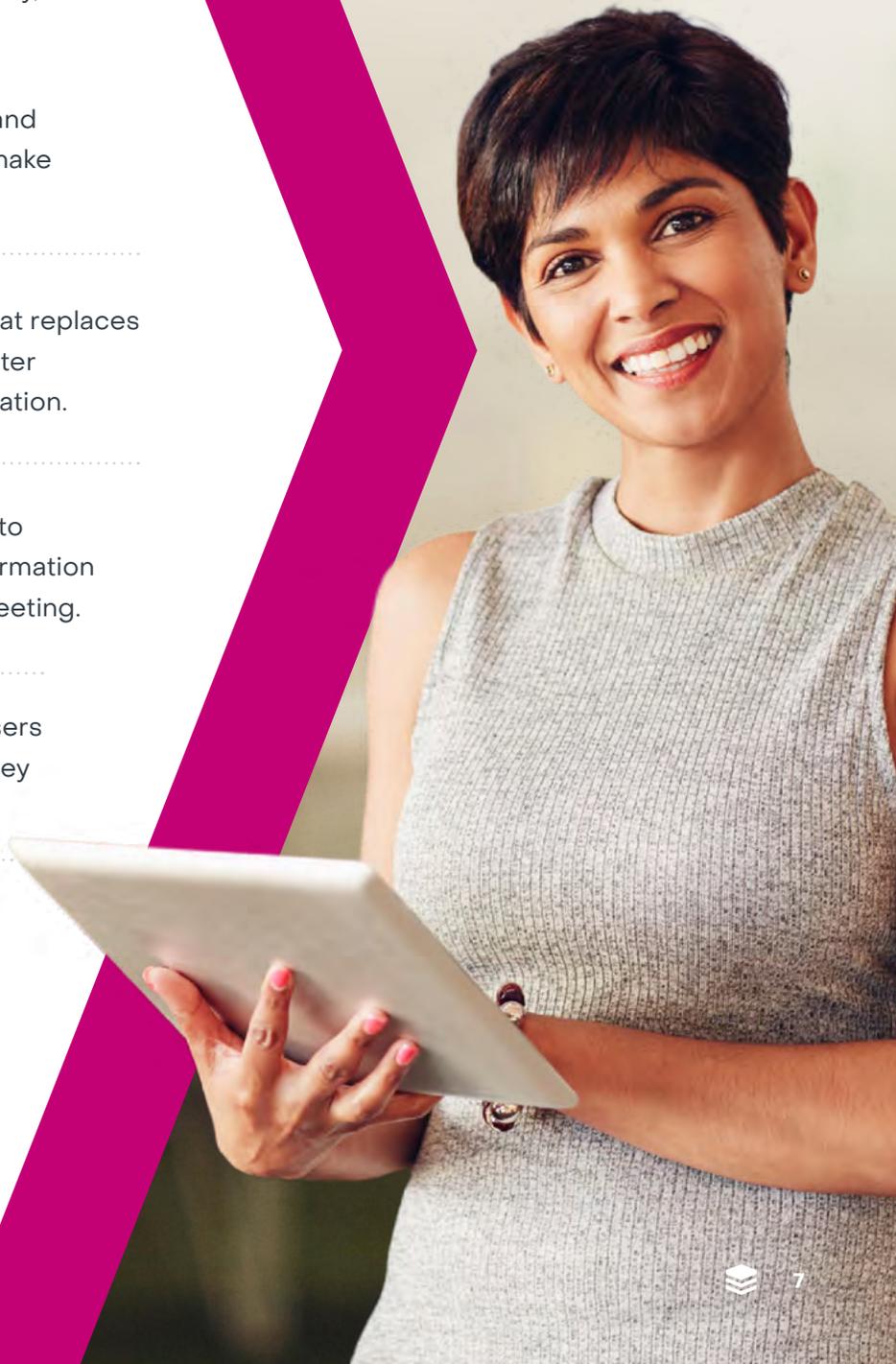
Give more power back to everyday users and give them full control over how they use, update and expand capabilities.



Even AI is easier, with AI capabilities pre-packaged and delivered right out of the box. We solve the difficult AI modeling challenges for you and pre-bake AI questions into your implementation so you can easily tailor analysis for your business needs.

"I was a Salesforce zealot... For the value you get, Sugar is just as robust — if not more. With such strong flexibility, the partner community and Sugar Exchange, it's possible for a company to take things forward faster and a lot less expensively."

— MICHELLE A, CMO, STAR2STAR COMMUNICATIONS



Phase 2: Implementation – Sugar’s Connected Team

The second key phase of your migration will be implementation. Particularly for mid-size companies who have over-invested in Salesforce (which really is designed and optimized for much larger enterprises), you’ll see how informative and reassuring the Sugar implementation process will be. The strength of your implementation team – and their ability to stay fully engaged with you and each other through your experience with Sugar – will be a key driver of the success of your CRM project.

With Sugar, you’ll be engaged with our implementation teams (both internal teams, implementation partners and ISV partners) from day one. You’ll typically be dealing with just three team members: a sales executive, solutions consultant who will demo and work through the details of your project, and your personal delivery partner. Sugar maintains a highly collaborative environment with our partners and third-party marketplace providers. We work closely with them to ensure they are committed to both quality customer service and low cost.

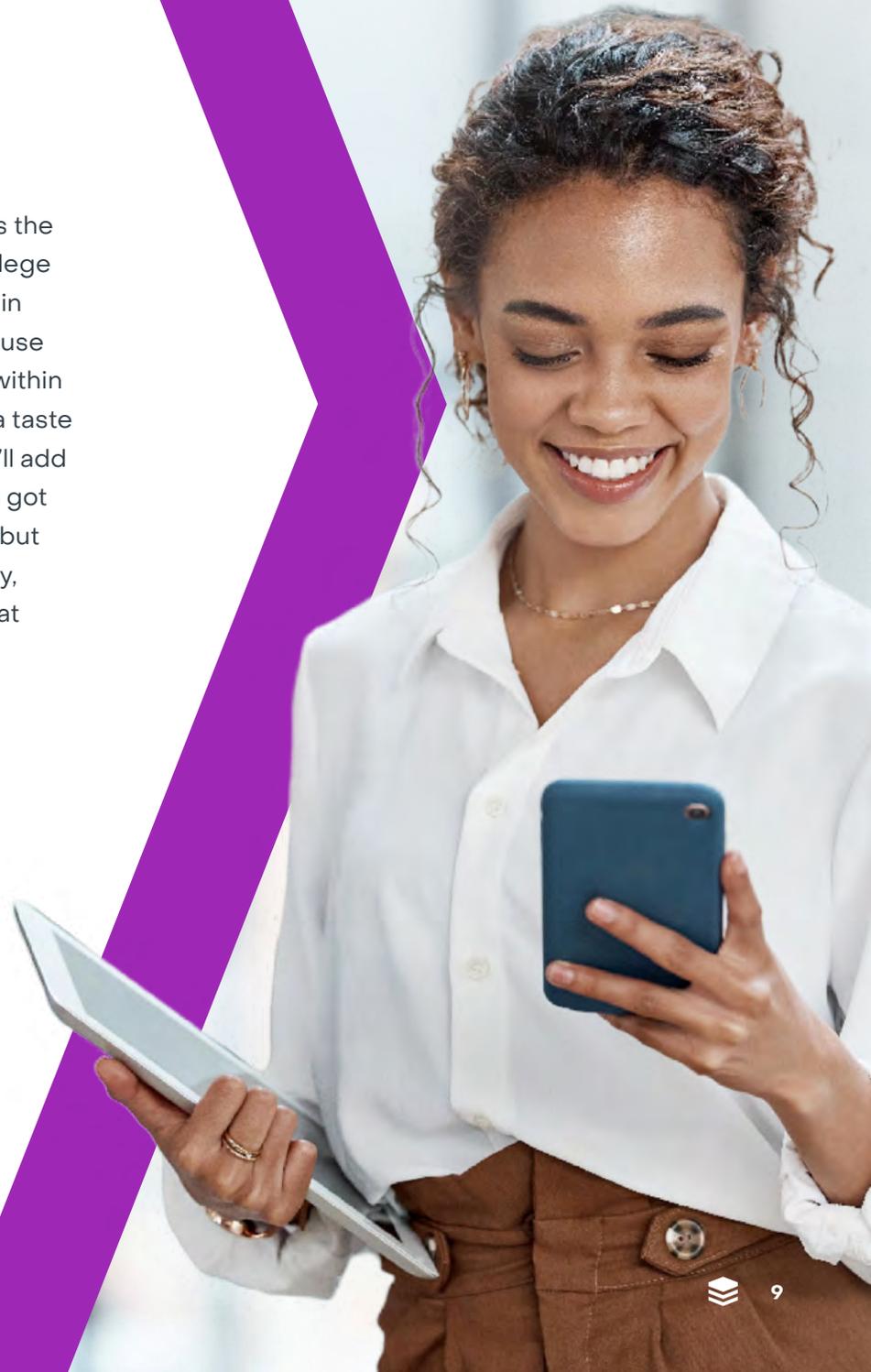
Each stakeholder is fully connected throughout the entire process, offering you full and easy transparency by exposing you to every key milestone along the way. Our commitment is baked in from the very start, and we’re accessible well after the dotted line is signed. We prioritize our customer experience to ensure a healthy, ongoing relationship to give you more confidence in the process and reduce any business risk. We also have delivery centers all across the globe, so no matter where you are, you’ll be teamed up with local implementation partners that will understand your regional requirements.

“Sugar has invested heavily in our own application ecosystem. Our customers have access to SugarOutfitters, a marketplace consisting of over 250+ third-party add-ons and integrations for SugarCRM.”

Avoid the Salesforce Tax!

Anyone who has been through a Salesforce implementation and integration understands the concept of the “Salesforce Tax.” It’s the privilege of having access to your customer data within the Salesforce system. You pay the tax because businesses above a specific size cannot fit within the API limits of Salesforce. They’ll give you a taste of your data and the interface, but then they’ll add on costs to provide you with full access. You got into Salesforce thinking it would cost you X, but when you add in sandboxes, backup, security, APIs and other add-ons, you’re now looking at additional cost multiples.

“We’ll give you a full visual environment using your own data right when your project gets started to show you what your new world can look and feel like. Once you see SugarCRM in action, it will be a game changer for your business.”



The Value of a Streamlined Implementation

Sugar can be implemented 32% faster than Salesforce, according to a recent G2 Research Report¹. Faster implementation means:



Faster time to value. If you spend less time on implementation, you're getting teams ramped up and things out the door faster.



Faster stays with you forever. As you adapt to changing business conditions, every change you make with faster configuration stays with you year after year.



Lower risk. The longer a project takes, the more risk that things can go wrong. Faster implementation lowers your relative risk and keeps deployment activities under control.

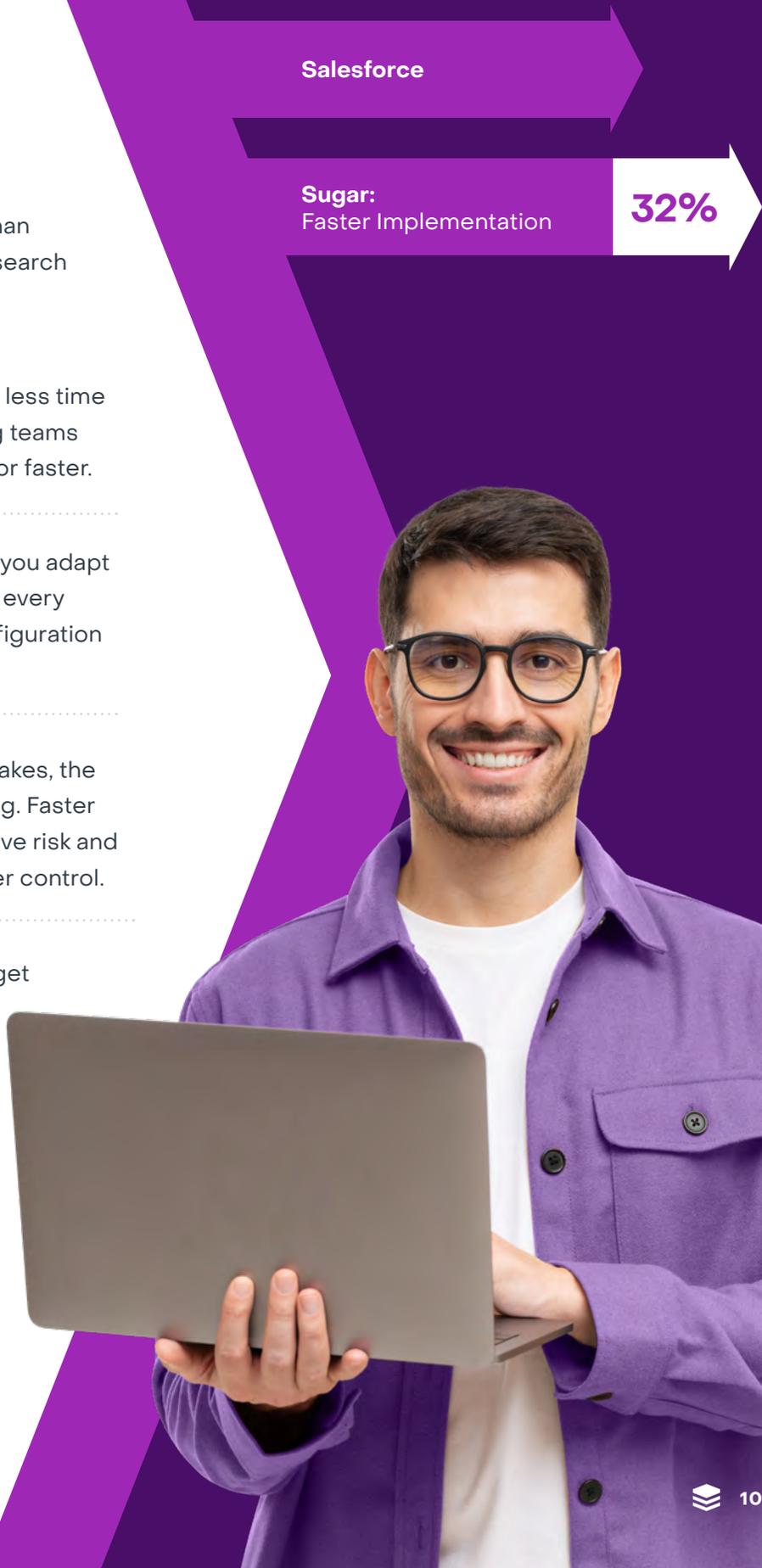


Less complexity means you can get staff educated more quickly and lower your ongoing costs.



Higher ROI now creates a multiplier effect over time for long-term benefits.

¹) <https://sugarcrm.com/resources/sugar-sell-outperforms-key-competitors/>



Phase 3: Processes and Workflow – Time for Key Improvements

There is always an element of redesign with any move to a new CRM platform. With a Sugar migration, you can be confident that the exercise will help you overcome process and workflow challenges you are used to facing. No process is perfect, of course, so now is the time to identify your

roadblocks and investigate how to do things better. You may have compromised your business values to match how Salesforce works in the past, but Sugar will help articulate what's broken and offer our proven best practices and pre-designed templates to deliver on the vision you've always had for CRM.

“Extremely adaptable, allowing us to establish any mix of process automation, which has proved critical in allowing us to undertake so many time-saving improvements to how employees function.”

– G2 REVIEW COMMENT

Improve Your Day-to-Day Workflows, Faster



All workflow automation in SugarCRM is drag and drop. It's one of the greatest features of our product and will vastly accelerate the development of processes.



Our streamlined mapping process enables us to demo revamped workflows for you immediately for faster evaluation.



We turn an anomalous business process into something much easier, removing the sting of process redesign and taking away your next biggest risk factor.



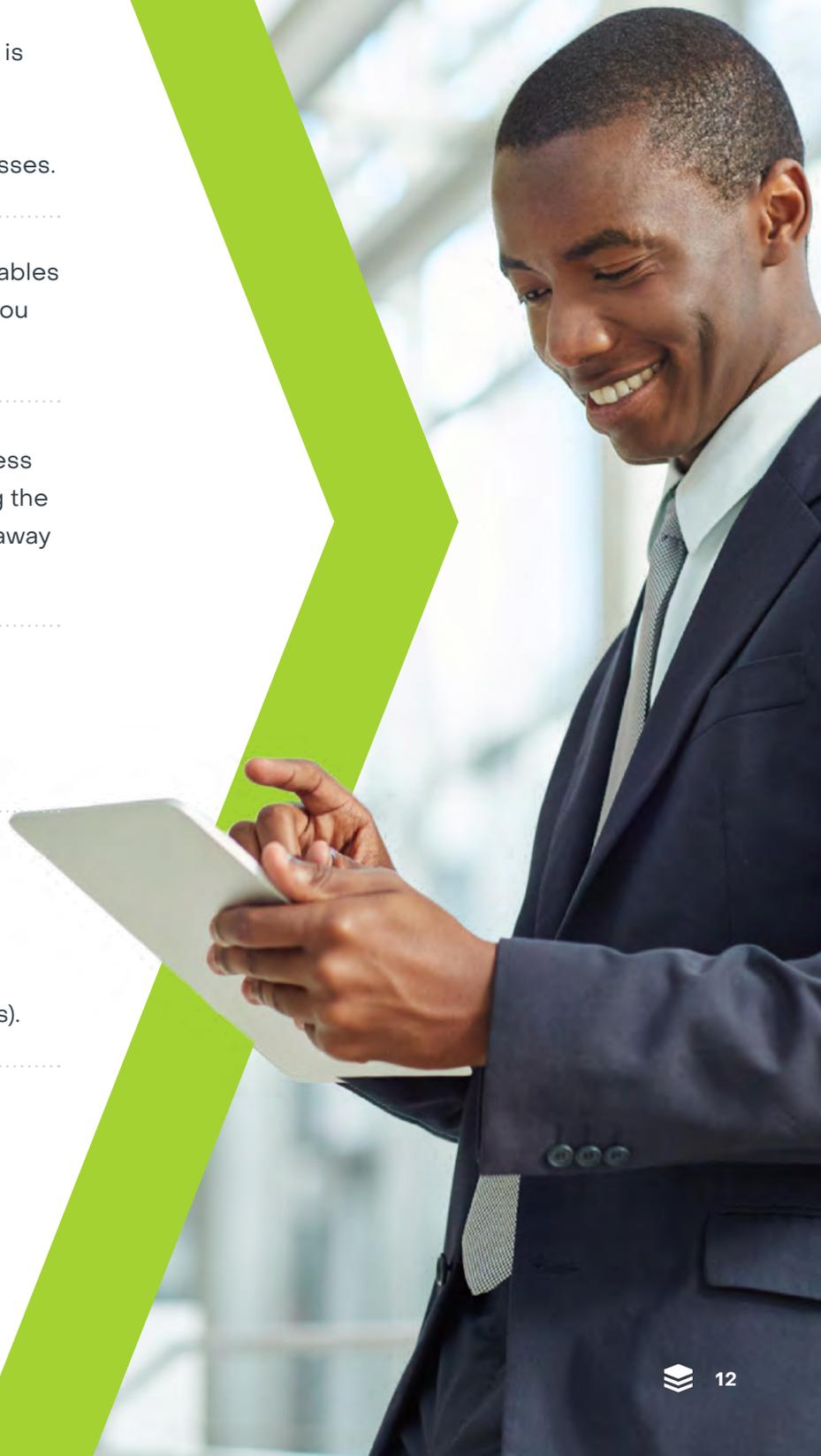
Gain a definitive starting point to acknowledge where you are and launch into a better future for CRM.



Business Process Management offers highly flexible workflow creation and automation, enabling a flexible and configurable CRM (unlike Salesforce's arduous and expensive customizations).



Identify where specific roadblocks and help design a better cadence of activity that matches your goals and keeps you from bogging down.



Conclusion: Sugar's Commitment to Help You Get Started

Committing to change is probably the hardest part for any organization, especially if you have significant time remaining on your existing Salesforce contract. There is a tendency to just stick with the Salesforce commercial construct and a bad value proposition, rather than face the perceived risk of a new project. This includes navigating through different billing cycles from add-ons you might have purchased from the Salesforce ecosystem.

SugarCRM's commitment is to work with you to build a critical path to migrate. We'll outline the process redesign, the resources and people you'll need, and make the price as palatable as possible to make the idea of migrating much easier. And because any CRM migration is also unpredictable, we can offer a fixed time/cost engagement that adds certainty to your project. Rather than an indeterminant time-based project that ends up being a best-guess scenario, we help you de-risk with a project that has a definitive starting and ending point.

Contact us today and see how Sugar can help you navigate your migration and get your CRM vision back on track.

“Sugar was the only vendor on our shortlist that actually listened to our requirements and didn't try to upsell us on the things we didn't need.”

– **NUCLEUS** – ANATOMY OF A DECISION, SUGARCRM VS. SALESFORCE (2023)

About SugarCRM

THE WORLD'S MOST LOVED CRM PLATFORM

SugarCRM connects your sales, marketing, and service teams by letting the platform do the work so they can focus on boosting productivity, business growth and engaging customers in moments that matter.



SELL: BUILT FOR THE MODERN SALES WARRIOR

Add intelligence to your pipelines and forecasts to focus on the right leads and opportunities, accelerate sales cycles, and transform from selling to relationship building.



MARKET: BUILT FOR MARKETING MAVERICKS

Engage every audience 1:1, automate the right messages at the right time, and create content and campaigns for optimal growth.



SERVE: BUILT FOR CUSTOMER SERVICE HEROES

Engage your customers on their terms and in every channel and deliver on your promises to achieve operational excellence.

SWITCHING FROM SALESFORCE TO SUGARCRM





Revolutionize Your CRM and Business

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

[GET DEMO](#)

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 or follow [@SugarCRM](https://twitter.com/SugarCRM).