**sugarcrm**

Unify CRM Best Practices with the Customer Experience

sugar automate

Customer experience has never been more important to business success. Now there's an exciting new way to make CRM the engine that drives a better, more seamless customer experience.

Unify CRM Best Practices with Customer Experience ///

Orchestrate Customer Experiences ///

Increase Business Efficiency ///
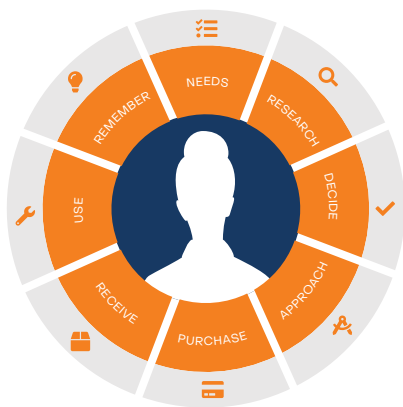
Customers today say that 70% of their buying decisions are based on how they feel they're being treated. 86% of customers say they're willing to pay more for a better experience, and 65% of customers say they leave brands that fail to meet their expectations for customer service.[1] What are businesses doing in response? Remarkably, 80% of CEOs believe they deliver a superior customer experience, but only 8% of their customers agree.[2]

The Sugar Automate enables organizations to close this gap by capturing each customer journey and operationalizing every step of the journey, tightly integrating it with their Sugar deployment. This alignment of company operations with the customer's perspective enables organizations to create extraordinary relationships — delivering more seamless, satisfying customer experiences and increasing business efficiency across the entire lifetime of their relationship with each customer.
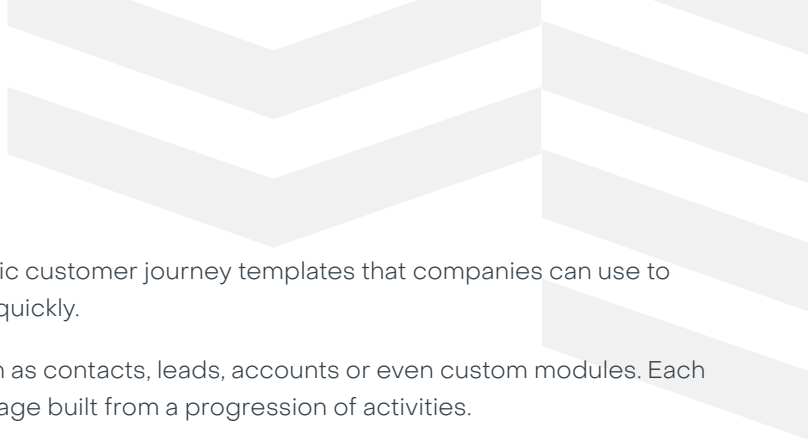
Orchestrate Customer Experiences

With the Sugar Automate, companies can define customer journeys that are specific to their business. These journeys can span the entirety of the customer lifecycle or focus on a particular segment of the relationship. Journeys can describe short-lived engagements or they may represent longer duration or even

cyclical lifecycles. The Sugar solution includes industry–specific customer journey templates that companies can use to define the journeys that are most applicable to their business quickly.

In Sugar, a customer journey can be applied to any object such as contacts, leads, accounts or even custom modules. Each customer journey is defined as a series of stages, with each stage built from a progression of activities.

Activities in the customer journey are modeled as native Sugar tasks, calls or meetings. Tying activities and business processes to a customer journey model enables companies to deliver more seamless customer experiences by providing insight to employees into where customers are in every stage of their journey and clearly indicating their needs and expectations at any point in time.

Increase Business Efficiency

The Sugar Automate increases efficiency by enabling businesses to focus employee actions on the needs of the customer at any point in time, keeping the customer perspective at the forefront of their thinking. Operationalizing the map in Sugar helps ensure everyone clearly understands what needs to happen at each step along the way to advance the relationship.

Consistently following an optimized customer journey model can increase the value of leads, opportunities and accounts. Leads are more likely to convert to prospects and opportunities when journeys are tracked, and consistent care is taken to educate and nurture individuals through each step. It's also important for organizations to customize business processes and treatments for different kinds of leads, since all leads are not created equal. The same principle applies to opportunities, accounts, cases and other activities as individuals work on to improving customer retention, expansion, cross–sell, upsell, and customer advocacy.

With limited resources, companies need to not only prioritize customer engagements, but also define the best ways to engage with different customers. The Sugar Automate enables organizations to define roadmaps to success and measure progress at every step of the way.

With the Sugar Automate, everyone understands where the customer is and what are the next best steps at every stage of the journey. Defining optimal customer journeys and using Sugar to operationalize them helps turn sales success and customer satisfaction into repeatable processes.

By tying the customer journey to SugarBPM, Sugar users can automate the execution of activities in each customer's journey. Journey activities can automatically trigger workflows and tasks, assigning these activities to the right individuals. This makes Sugar a powerful engine to guide customers and coordinate employees through the entire customer journey.

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.**