sugarcrm

The 2022 CRM Buyer's Guide

Get a clear picture of your customer and reach new levels of performance and predictability with the right CRM solution.

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Making CRM Selection an Effortless Experience

Choosing a CRM system is a big decision for any organization, whether you're starting your first implementation, switching out point solutions, or performing a cross-departmental replacement. But the process doesn't have to be a daunting challenge that keeps you up at night. Several key tenets can guide a wise decision-making process and help you rethink your age-old workflows.

Out-of-box CRM features are great, but the key is knowing how to add real value to your existing competencies and styles of doing business. Most CRM systems will get you 80% of the way there, but it's the remaining 20% that makes the implementation special. Your specific selection process and deployment should reflect the core DNA of your company's brand and competitive differentiators so you can supercharge your customer experience.

There are many options out there. Some CRM systems have broad functionality and address most use cases, but you'll end up paying the price in complexity. In these cases, it takes an army, not just a village, to get it up and running properly. Other CRM systems are easier to deploy, but you're locked in a rigid configuration. In these cases, it's their way or the highway.

Another consideration is your ability to react quickly to market conditions. Most companies don't have a whole year to implement and adopt a CRM system, so you need to move quickly to reach an acceptable time to value. You'll need to experiment to see what features work best for your use cases and make updates quickly and efficiently.

It all comes down to striking the right balance between deep, complete technical capabilities—easy to deploy, customize and derive organizational value—while preserving and even amplifying your brand and style of doing business.

> **"SugarCRM has a four-part vision of what a successful SFA solution must encompass. Together, these components—its high-definition customer experience, no-touch information management, continuous innovation, and lifelong commitment to customers—lay the groundwork for transformational growth and distinguish SugarCRM in a crowded field of respected contenders."**
>
> **—JEANINE S.,** INDUSTRY DIRECTOR, FROST & SULLIVAN

Amplifying Your Customer Experience

In this era of increasing customer-centricity, your customers care only about their experience with your products and services, not your internal challenges in organizational complexities. They expect a seamless cross-functional experience, from the moment they first visit your website to when they consume your demand gen content and nurture campaigns, to buying, communicating with you 24/7 with service requests, and becoming customers for life.

When customers have a seamless journey across sales, marketing, service, and every other critical workflow, they enjoy a high-definition customer experience (HD-CX)—one which shapes their sentiment with your company on a fundamental and personal level. Remember, you're buying CRM for your customers and their experience. It reflects your organization's brand and tech-savviness, showing your empathy for their needs.

With the right CRM at your fingertips, you're able to evaluate all touchpoints of the customer journey, determine how to optimize their experience, and create a consistent cadence of sales, marketing and service activity. You'll turn every stakeholder into a customer expert, armed with insights and information often before they even ask for it. A high-definition customer experience driven by your CRM platform just makes the hard things easier.

> **"Our customers got confused battling with inconsistent journeys. The new CRM has given people a better toolset but it's also enabled a cultural change, so our vision for customer experience is now a reality.**
>
> **—ERIK F.,** CIO, P&N BANK

The Importance of Connected Customer Data and Insights

Imagine trying to piece together a great customer experience when every stakeholder, from sales and marketing to service, IT, and finance, is working from a different playbook. Everything you do revolves around your ability to act on customer data and requirements and orchestrate a coordinated action. First and foremost is your ability to offer the same comprehensive view of each customer interaction to every team. By creating a shared data platform across all CRM activities, where data flows seamlessly across the organization, you set the stage to provide a consistent experience with:

NO BLIND SPOTS
Instantly display all relevant information, including past, present, and even future predictive insights, rather than piecemeal views of the customer.

NO BUSY WORK
Automatically capture data and present it in context to everyone who needs it, rather than manually entering endless details.

NO ROADBLOCKS
A platform built around your needs and workflows, rather than settling for a standard solution with standard limitations.

Gartner
Magic Quadrant

9X VISIONARY FOR SALES FORCE AUTOMATION

Sugar named a visionary for the ninth consecutive year

NUCLEUS RESEARCH

NUCLEUS CRM TECHNOLOGY VALUE MATRIX | 2021

SugarCRM placed in the leader's quadrant

From a functional standpoint, that means providing:

- Current, fresh data in real-time that offers a 360-degree view of every customer.
- Contextual dashboards and reports that immediately display the exact information you need and make it easy to drill into the accounts for more detail.
- Insights into what's at stake in each account and opportunity, arming you with a deeper picture to take proactive or corrective action, even before a potential problem arises.
- Visualization of the data to help users conceptualize information, determine the next best action, and act decisively.

Think of it as behavioral science—seeing vital historical activity across sales, pricing, marketing, service issues, and even customer conversations that will shape every ongoing interaction.

NUCLEUS RESEARCH

95%

Sugar accelerates campaign creation by 95%

50%

Reduce marketing teams' workloads by 50%

AI-Powered CRM

When AI is purpose-built into the infrastructure of your CRM, you gain unprecedented predictive insights and automated intelligence to drive business efficiency and results. Pre-packaged, embedded analytics link insights to action and make it easy for end users to master without any data science or AI expertise. AI-powered CRM enables a wide range of use cases, including:

- Engagement-driven lead scoring and likelihood to convert through the marketing funnel
- Sales opportunity scoring on likelihood to close and next-best action
- Sales playbooks and prescribed communications throughout an opportunity
- AI-assisted forecasting, customer churn prediction, and upsell/cross-sell optimization
- Time intelligence to capture changes in sales stages and assign ownership and action
- Experience-led support and service optimization to identify critical behavioral signals
- Conversational AI to enable chatbox interaction and customer dialogue analysis

Easy, Intuitive, and Accessible: Will Your Users Actually Use It?

Like any technology, users must see its value to use it. If you make the interaction approachable, easily accessible, and practical, your teams will step up and adopt it because they want to. They'll see all the data they need at a glance, guiding them along each next step to optimize every action they take. A "one tab to success" view replaces multiple open tabs (a messy, unwieldy approach) to make it more intuitive and contextual.

Don't think about CRM in terms of 'configuration.' It shouldn't be that complex. Instead, think of it in terms of accessibility—giving the people using it total control over how they use it, update it, and expand it.

> **"SugarCRM has the highest user adoption in the marketplace because it keeps it very simple for the end users."**
>
> —**GARRETT H.,** VICE PRESIDENT OF CUSTOMER EXPERIENCE, BRAINSELL (PARTNERING WITH SUGARCRM CUSTOMER TETLEY HARRIS ON TRANSITION)

You shouldn't need a team of consultants building out functionality. Just a small team of admins should build and customize views and effectively run the entire system. A configurable and accessible CRM solution makes it effortless to create user roles with unique characteristics, easily defined and adaptable to change over time.

> **"SugarCRM has a best-in-class mobile app with real-time access to customer data so there are never any surprises for my team before they interact with customers."**
>
> —**JASON M.,** VICE PRESIDENT OF SALES, MATERION

The right CRM system lets you own the UI, creating and changing it without technical expertise. It should offer:

- Drag and drop configuration of the interface, even for mobile
- Easy stylization of the UI by admins to match your brand
- No training required, where the user has full control over the UX, dashboards and reporting
- AI-driven capabilities that provide quick answers to questions, alerts to priority actions, and important insights that individuals might miss
- Simple configuration and adaptability of mobile capabilities for sales and field teams

Connecting Key Processes and Stakeholders

With the CRM foundation in place, the day-to-day connected workflows working together can bring your CRM to life. It starts at the top, with a pre-defined strategy to align KPIs upfront and establish an agreed-upon set of definitions across departments. By building a shared "dictionary" of common terminologies, for example, each team understands what success looks like, such as what a qualified lead is, when an issue is considered resolved, and what constitutes a satisfied customer.

Moreover, the internal handoff process must be clearly documented to ensure a seamless transition from marketing to sales, service, finance, and other key customer-facing groups. The more each team knows upfront about their handoff requirements, the better-aligned teams will be and the more coordinated the customer experience will look.

Core CRM Use Cases

Consider these key use cases and how the information flows throughout each process.

Sales Forecasting

Sales forecasting is a critical activity on which many organizations invest a huge time commitment. Much of the nuts-and-bolts analysis can be done quickly and analytically with the right CRM system, including:

PIPELINE INSPECTION

Account managers determine what is likely to close each quarter, prove how likely the close will be, and keep the most accurate amounts up to date. Enhanced capabilities help inspect pipeline forecasts and make the analysis clear at every stage of approvals and rollups, from AMs to the Sales VP, CFO, CEO, and Board of Directors.

REVENUE FORECASTING

Sales teams are called upon to perform an analysis and make a call on how much upside will come in for each potential opportunity. Predictive intelligence helps determine what the appropriate commit numbers are at each approval level and what the upside might be. Forecasts can be easily aggregated up the approval chain, and estimates can be revised as circumstances change along the course of a quarter, for example.

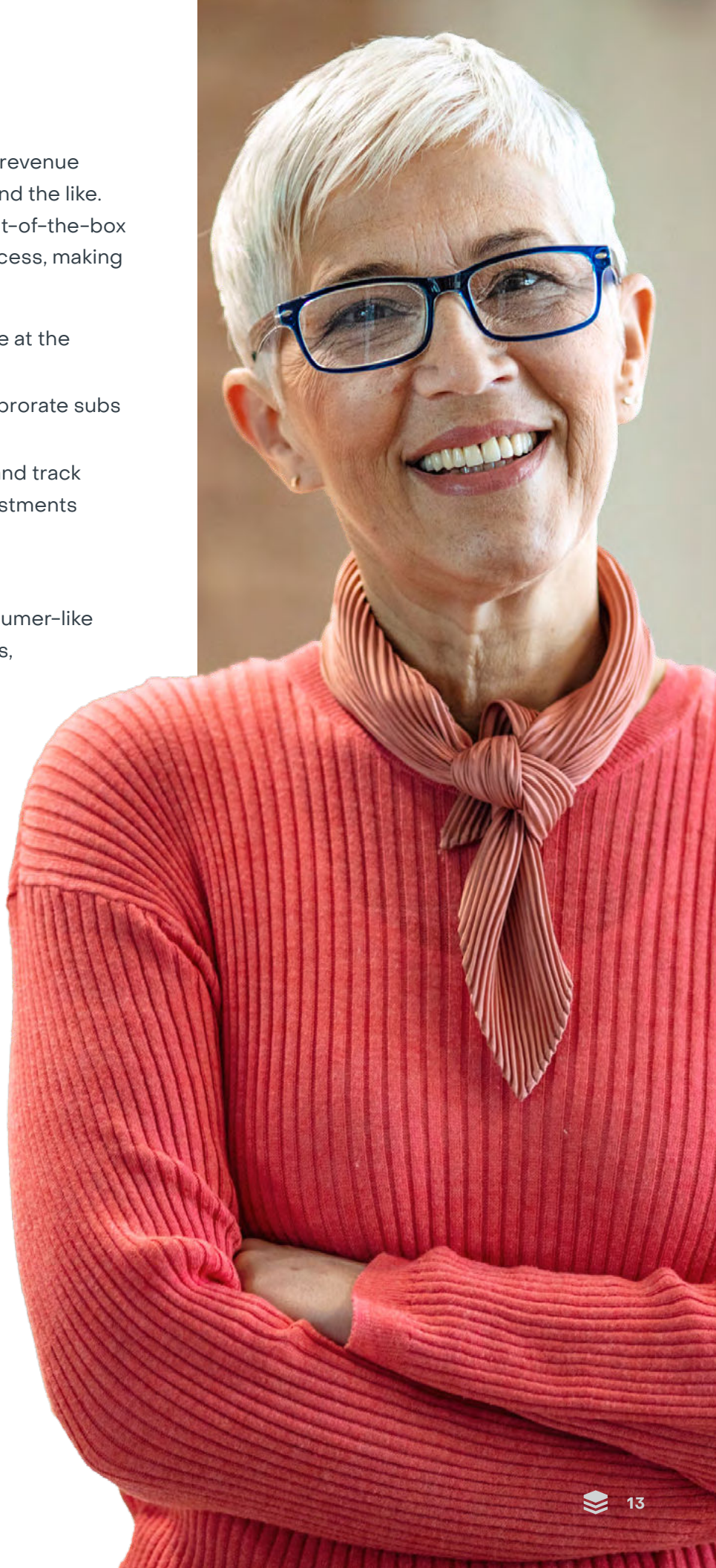
Recurring Revenue

Many companies rely on a strong recurring revenue stream based on subscriptions, renewals, and the like. This is a required core competency, with out-of-the-box capabilities to manage and simplify the process, making it easy to:

- Create an automatic renewal for a service at the expiration of the initial contract
- Add or adjust service levels, amend and prorate subs and pricing based on approvals
- Create a full history of each transaction and track ongoing service, subscriptions, and adjustments

Self-service Engagement

Everyone has become accustomed to consumer-like engagement with websites and applications, including the ability to find fast answers to questions on their own, without the need to file a ticket or talk to a rep. Self-service engagement centers offer 24/7 access to extensive knowledge bases so that customers can look up solutions and best practices on their terms, whenever and wherever they need it. And if they still need assistance, they can always file a service request after doing their due diligence and research.



Marketing and Sales

Marketing teams with a complete view of each customer account have better context with which engage more effectively and pass the baton to sales at the right time. Leads need context: for example, which campaigns they've responded to, which content each person has downloaded, webinars they've attended, and which promotions they've engaged with. Accounts can easily be scored to determine what type of engagement is most relevant for each and how to handoff to sales to empower a more targeted outreach and communication. Better qualification of leads will invariably drive stronger alignment and trust between sales and marketing teams.

> **"Being able to analyze email campaign results allowed our sales team to formulate direct and concise follow up—and generate activity that would have been forgone."**
>
> —**LARON W.,** SALES MANAGER, NEENAH PAPER

Intelligent Service Workflow

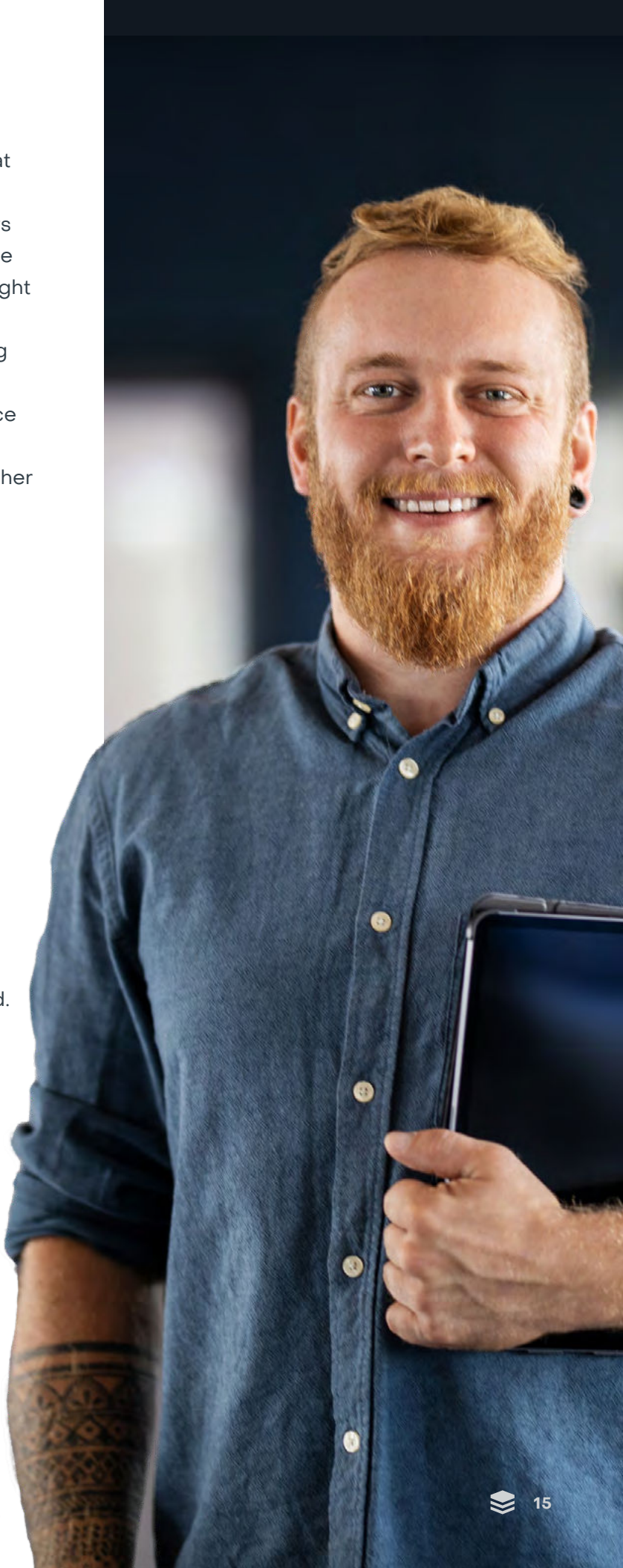
Coordinated sales and service alignment ensures that every service case is dealt with in the most informed manner to boost the customer experience. Workflows automatically trigger next step interactions for service teams, and service calls can be routed easily to the right subject matter expert to provide the most impactful solution. In cases where SLA thresholds are not being met or being exceeded, alerts can be automatically generated and intelligently routed to guide the service resolution lifecycle. CRM-enabled customer support ensures better post-sales delivery, installation and other add-on services.

> **"When we saw the tight integration Sugar Market and Sugar Sell had, transitioning to Sugar Market was a no-brainer for us."**
>
> **—JULIE F.,** DIRECT MARKETING MANAGER, CIRESON

Finance

Finance teams play a vital role, making orders, payments and delivery details available to all relevant stakeholders. Connected CRM workflows empower:

- Identification of at-risk accounts that have not paid. A simple call from the sales rep can often alleviate challenging cases.
- Faster contract management to expedite the time-to-close.
- Order management automation post-sales to ensure orders are fulfilled and billed.
- Managing and tracking customer claims, returns, and refunds through workflows and processes integrated directly with financial systems.
- Intelligent purchase order creation, ensuring timely alerts and enforcing parameters around purchasing activities.



The Power of the CRM Platform

Today's high-performing CRM platforms are built for flexibility, with the ability to fit into any infrastructure and technology or process environment. It starts with the simplicity of coding, which is open and developed with standard common programming languages (not proprietary). Coding options make it easier to optimize user interfaces, lower operational complexity and evolve capabilities to match business growth. Three common coding models supported include:

NO-CODE
Process automation is all run in the background in response to changes to user data. Business processes are more easily orchestrated across departments, and each user can configure screens with simple customization.

LOW-CODE
In this model, it's easy to pull in data from external data sources (such as LinkedIn contact data) and integrate and validate with other systems.

FULL-CODE
Many companies want to build in something unique for users and show off the 'secret sauce' of their brand. This model builds in functionality seamlessly to display their real differentiators.

> **"What I like about Sugar is how much room we have to grow and become more efficient over time. With Sugar, we feel the scale is unlimited."**
>
> —**NICK C.**, CO-FOUNDER, COMMUNITY TAX

CRM is also built to be designable. Systems should be easily configurable to behave any way a user wants, with the flexibility to plug right into each distinct process. Workflow rules, conditional automation, triggers, and SLA functionality can be orchestrated without hitting the technology wall. The system should optimize:

- Cloud and on-premises options, hosting files in the vendor cloud or your AWS cloud or datacenter.
- Mobile capabilities, where every process can be configured and accessed via mobile
- Easy linking to external solutions such as LinkedIn for browsing a customer's circle of contacts and apps that scour media sources to surface news activity for an account.
- AI-powered CRM, delivering AI capabilities and models that have already been created for you, helping you make predictions, navigate massive amounts of data, and discover relevant insights.
- Natural language processing (NLP), combining structured with unstructured data (such as social, emails, and call center recordings) to assess urgency, prioritize cases and create better automated responses.
- Easy integration with ERP and MRP systems, with unlimited API calls.

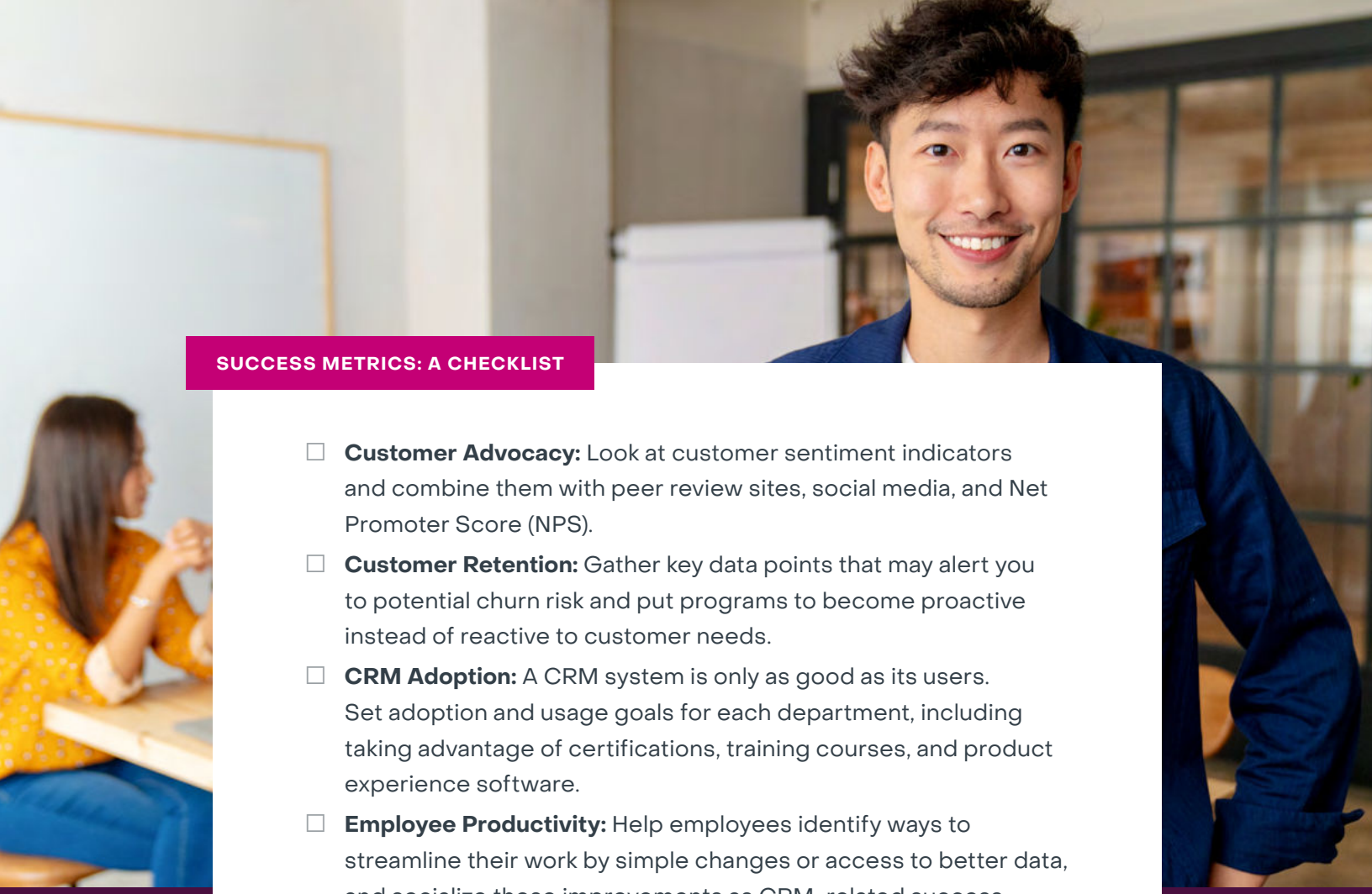
> **"All you need is a vision of where you want to go, and then you can adapt Sugar to meet your needs."**
>
> —**SHEILA J.,** EVP OF OPERATIONS, STAR2STAR COMMUNICATIONS

Success Metrics Checklist

Checklists are essential to ensure you're not missing anything in the selection process. Here's a sample guide and best practices:

SUCCESS METRICS: A CHECKLIST

- ☐ **Customer Relationship Management:** Track whether sales, marketing and service teams have a clear picture of the customer or prospect activity to identify new opportunities and deliver an exceptional customer experience.
- ☐ **Conversion Rates:** Track current conversion rates across all defined sales stages to establish baselines to benchmark success. Include sales, upsells, and cross-sells in tracking.
- ☐ **New Business Growth:** Track new customer accounts and net recurring revenue.
- ☐ **Sales Performance:** Get as granular as possible with your team's performance, such as average sales cycle, deal size, opportunity win rate, lead response times, and time management.
- ☐ **SLA Compliance:** Manage performance and compliance with service level agreements with your customers (and among internal teams)



SUCCESS METRICS: A CHECKLIST

- ☐ **Customer Advocacy:** Look at customer sentiment indicators and combine them with peer review sites, social media, and Net Promoter Score (NPS).
- ☐ **Customer Retention:** Gather key data points that may alert you to potential churn risk and put programs to become proactive instead of reactive to customer needs.
- ☐ **CRM Adoption:** A CRM system is only as good as its users. Set adoption and usage goals for each department, including taking advantage of certifications, training courses, and product experience software.
- ☐ **Employee Productivity:** Help employees identify ways to streamline their work by simple changes or access to better data, and socialize those improvements as CRM-related success.
- ☐ **Lead Quality:** Leverage AI-powered features to predict which leads are most likely to convert and close and keep an eye on lead to opportunity conversation rates.
- ☐ **Automated Outreach:** Compare response rates and outcomes of automated programs versus manual efforts to show success. Use personalization whenever possible.
- ☐ **Engagement and Communication:** CRM should help keep customer relationships fresh.
- ☐ **Speed of Response:** Track time to resolution for customer service representatives with incremental improvements to workflow and an integrated service platform.
- ☐ **Fulfillment and Onboarding:** Measure whether the CRM is helping you complete post-sales operations faster.
- ☐ **TCO:** Set a budget for CRM implementation, maintenance, and growth, and measure against it. Target cost savings related to the CRM deployment and measure for improvements.

Conclusion: Follow the CRM Buyer's Roadmap

Whether you're starting from scratch with a single process or replacing an unwieldy, complex CRM system, it takes planning and alignment to make it all go smoothly. The need often starts with just one department, such as marketing needing better campaign management or sales needing better customer visibility. But you don't want point solutions to solve individual needs when you can integrate so much more. Fully analyzing the scale of your implementation requirements will help you set the stage for better results.

Do your due diligence and determine how to link one-off needs into one comprehensive solution. Get the right stakeholders involved across all departments (your A-team), and define your workflows, engagement parameters, common measurements, and inter-departmental needs. That's when you'll discover the gaps and bottlenecks and how your unique deployment can overcome the business challenges. Finally, remember that a CRM platform isn't just a starting and ending point. It should put you on a continuous improvement and innovation path to align your teams and provide a high-definition customer experience.

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**.

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