



A SPECIAL SUGARCLUB WEBINAR

# Joining SugarClub: How to Get the Most From Sugar's Online Community



# Meet Your SugarClub Team



**Jana Ferguson**  
*Director,  
Customer Enablement*



**Brie Rowe**  
*Director, SugarU*



**Alex Nassi**  
*Sr. Community Manager*

# Agenda

01 What is SugarClub?

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02 What's In it For You?

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03 How to Be an Engaging Member

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04 Level-Up Your Sugar Knowledge

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05 Q & A



# What is SugarClub?





# Out With The Old, In With The New



community.sugarcrm.com

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Launched Fall 2015

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Technical / Support Centric

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Rooted in “Old Sugar”  
Methodology



## **New name!**

SugarClub (“The Club”)

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## **New focus!**

Engagement, Certification,  
Training, Best Practices,  
Individuality, Advocacy,  
Experience

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**New Sugar!**

# Mission Statement

It's **SugarClub** - are you in? **Engage, Learn, and Explore** with customers, partners, and employees around the world as part of one elite team. Level up your Sugar knowledge and share your expertise, transforming into a Sugar all-star with each impactful interaction. Join like-minded professionals who are passionate about exceptional customer experiences — we've reserved your spot.



# Why SugarClub?

- Engage and interact in a clear and exciting space
- Find resources and help to streamline support resolution
- Surface training & certification to support adoption
- Connect with the global Sugar community as part of a close-knit team of Sugar users
- Elevate your Sugar experience



# The Club Cornerstones





# Engage

## Type of Content

Best Practices, Stories, Blogs, Discussions

## What

Share and find best practices specific to your role, share ideas, start discussions and find creative solutions to meet business needs with Sugar products.

## Why

Inspire, Innovate, Individual



# Learn

## Type of Content

Learning Pathways, Live Classes, Training Resources, Sugar Certification Program

## What

Drive adoption and level-up your Sugar knowledge via this gateway to SugarU.

## Why

Learn, Adopt, Educate



# Explore

## Type of Content

Support Content, Product Guides, Documentation, Questions

## What

Find technical fixes and ask questions, get help, focused on administrators and end-users.

## Why

Solve, Ask, Adopt

# What's In It For You?



# What's In It For You?

## FOR SUGAR END-USERS

- Learn tips and tricks for using Sugar products more efficiently
- Engage with other users in similar roles to ask questions, share best practices, and network
- Collaborate on technical issues with subject matter experts
- Find additional training and educational resources

## FOR SUGAR ADMINS

- Stay up to date on the latest news, events, feature releases, and updates for all Sugar products
- Engage with other administrators to solve challenges and find business solutions
- Find additional training and educational materials to level up your Sugar knowledge
- Discover solutions to help drive end-user adoption

## FOR SUGAR CHAMPIONS

- Stay in the know on the latest Sugar news
- Understand how other companies use Sugar to support their business needs



# Believe the Numbers

Club Members

1,772

since launch on  
August 3, 2020



277

Badges Earned



1,525

Discussion  
Replies



273<sup>?</sup>

Questions  
Answered



369<sup>👥</sup>

Discussions Started





# Meet Our SugarClub Members

1



**Mauricio Sánchez Rodriguez**

5



**Laxmichand Saini**

2



**Kristjan Geir Mathiesen**

6



**Luke Ridgway**

3



**Heather Wright**

7



**Hussain Nasir**

4



**Dhanalaskhmi Vusirika**

8



**Raina Awais**



# The Fun Way to Level-Up Your Sugar Knowledge

## Gamified Engagement

Earn Badges and Points for every interaction

## SugarClub Player Profile

Build a team roster of friends, share your top skills, and see how you rank

The interface displays a 'Points' section with a list of activities and their corresponding point values. Above the list is a circular arrangement of six badges: Ambassador II (orange shield with a trophy), Early Adopter (blue shield with an hourglass), Employee (blue shield with stacked books), Explorer (green circular badge with binoculars), Helping Hand (green shield with two people), and a central document icon with a checkmark. A user profile icon is also visible on the right side of the circle.

Points	
Members will earn points for engaging in SugarClub that can later be used for swag, free training, and more. The more points you earn the more swag you can win.	
Points Description	
Publish a blog post or share your story in one of the Engage groups.	20 POINTS
Your response to another Club Member's question is verified as a correct answer.	20 POINTS
Reply to another Club Member's question.	15 POINTS
Leave a comment on a blog post or story.	10 POINTS
Submit an idea.	10 POINTS
Ask a question in the Explore group.	5 POINTS
You accept a friendship request from another Club Member.	5 POINTS
Another Club Member accepts your friendship request.	5 POINTS
You upload a media file.	5 POINTS
Your content is liked by other Club Members.	1 POINTS

# See What Members Are Saying





“SugarClub improves my Sugar experience. With so many other users helping each other by posting solutions, I find SugarClub helpful when I need to write custom code to solve complex problems. There are different views on what worked for them and what didn’t, and this lets me pick the best solution that suits our needs.”

**—Ronwil Mendonca**, *Senior Full Stack Developer, CMPA*

"There are so many great, generous people in SugarClub and the support you get there is amazing. Nowadays whenever I run up against a problem, my first instinct is to check SugarClub and see if someone has had the same issue. There is no doubt in my mind that the vibrant community found in The Club is a huge help in managing my SugarCRM instance."

—**Kristján Geir Mathiesen**, *Systems Analyst, Origo hf*



# Hear From A SugarClub Champion



**Kristján Geir  
Mathiesen**  
*Systems Analyst, Origo hf*

Sugar Community  
Since April, 2015

SugarClub Champion  
Since August, 2020



# How to Be an Engaging Member



# How to Interact in The Club

Share how you use Sugar on a daily basis, or start discussions, ask questions and share best practices relevant to your role.

  
**Engage**

Ask questions in our dedicated product groups, interact with subject matter experts for those products and stay up to date on product updates.

  
**sugarclub**

  
**Learn**

Browse SugarU's course catalog, register for live classes, and get Sugar certified.

  
**Explore**



# Club Tour



# Have feedback to share?



Email us at [sugarclub@sugarcrm.com](mailto:sugarclub@sugarcrm.com)

## Exclusive Sneak-Peek of What's Coming:

- Industry focused user groups to engage with your peers
- Quick video tutorials to kick start your learning
- Multilingual experience
- Ongoing site optimization



# The Fun Doesn't Stop Here



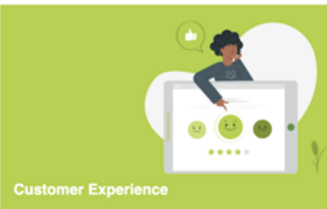
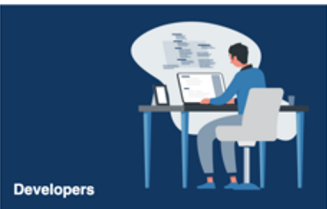
## Share your story!

Post a blog in Engage explaining how you use Sugar in your day-to-day role by December 1, 2020 to earn a special badge.

**Welcome to Engage**

Now that you're in The Club, it's time to meet people and get to know one another. Engage with your peers, share your successes, and get advice on how to improve your outcomes. We've built this area of The Club for members to learn from one another and share ideas to help them grow in their role.

Choose your area of expertise below to share your story or start a conversation.

 Marketing	 Sales	 Service
 IT & Operations	 Customer Experience	 Developers

# Questions



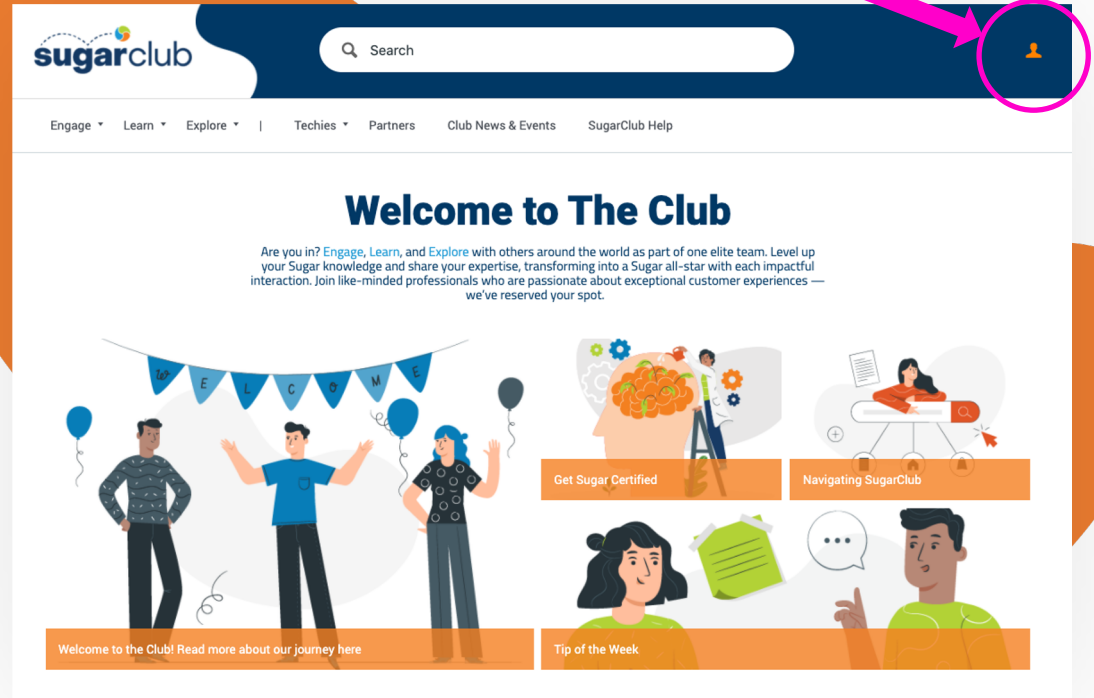
# Thank You!



# Appendix

# How to Access and Use SugarClub

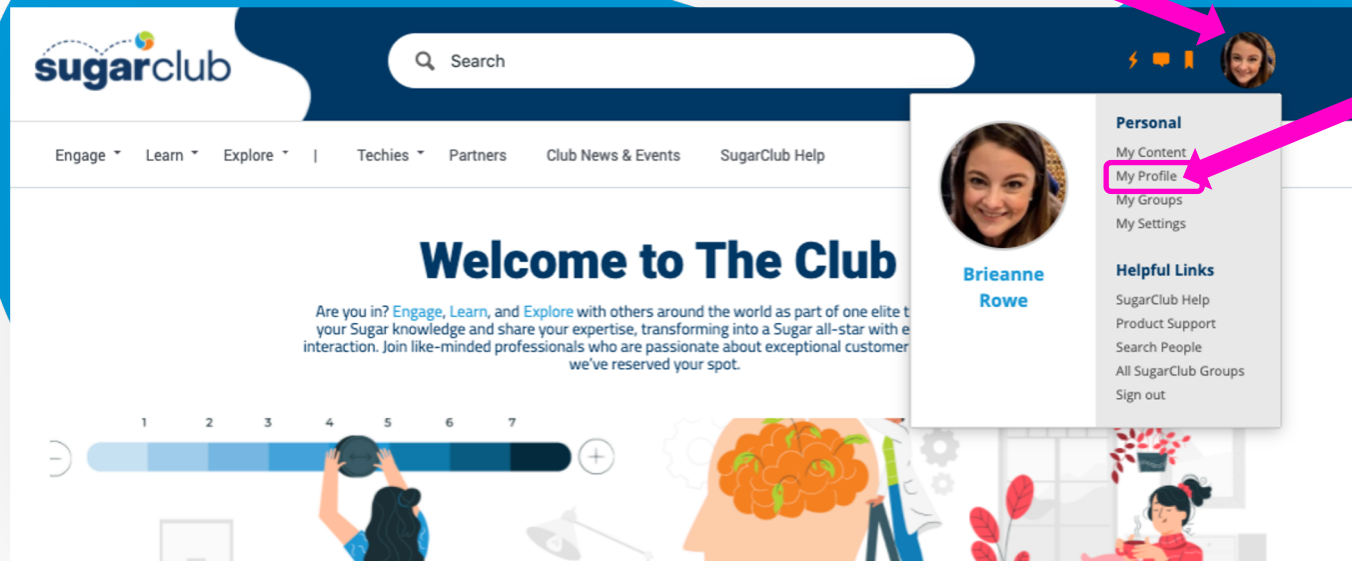
# Logging in





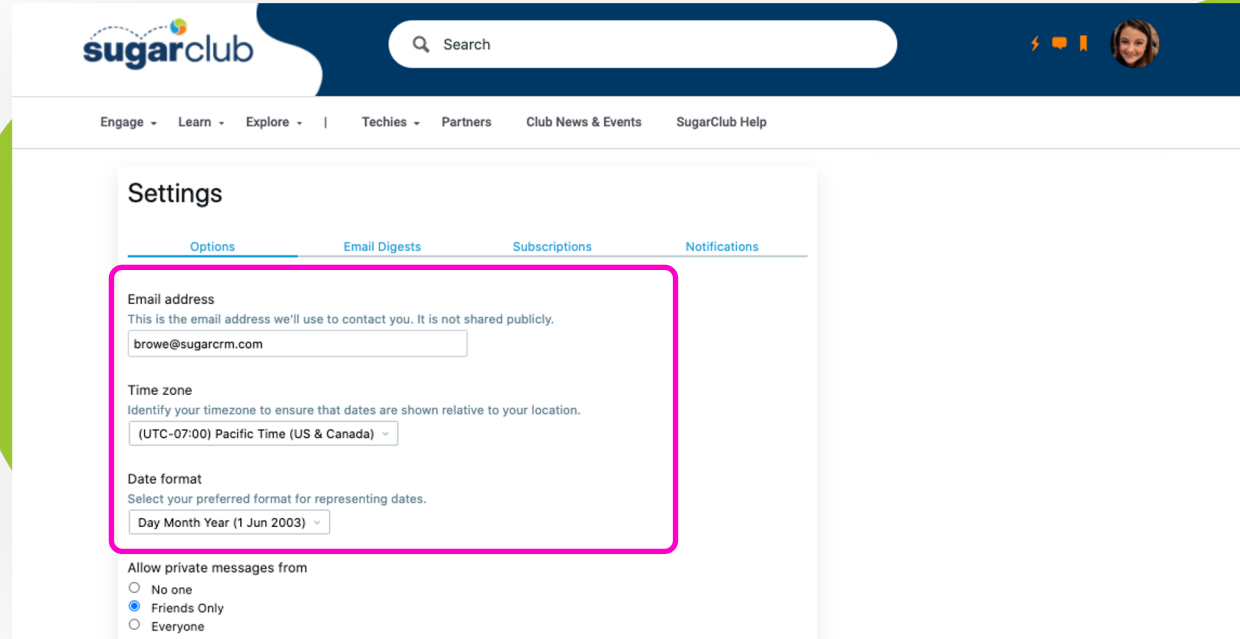
# Updating your Profile

- Picture/Avatar
- Biography
- About panel



# Updating your Settings

- Time zone
- Email Digests
- Subscriptions
- Notifications



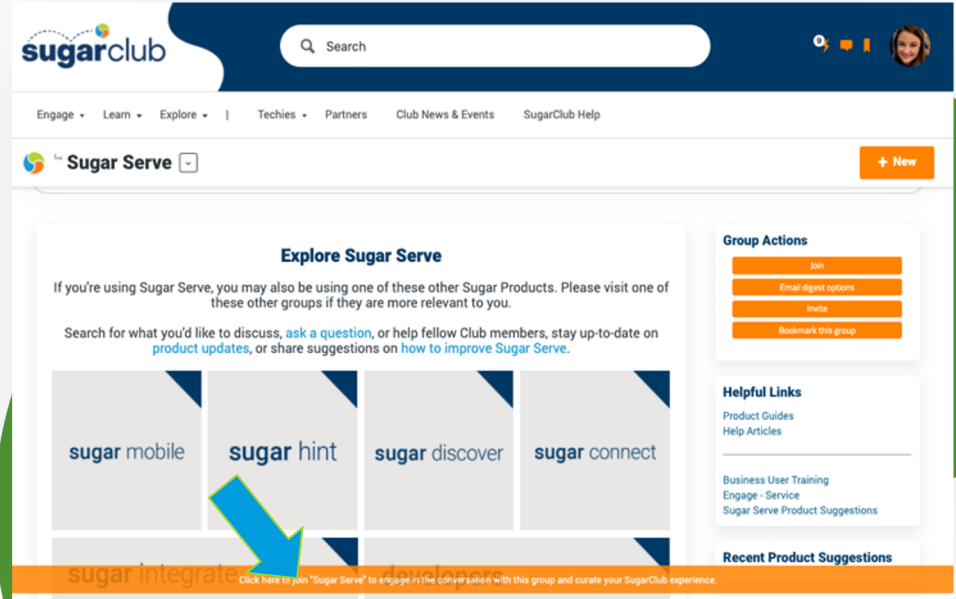
The screenshot shows the SugarCRM user interface. At the top is a dark blue header with the SugarCRM logo, a search bar, and a user profile icon. Below the header is a navigation bar with links: Engage, Learn, Explore, Techies, Partners, Club News & Events, and SugarClub Help. The main content area is titled 'Settings' and has four tabs: Options, Email Digests, Subscriptions, and Notifications. A pink rectangular box highlights the 'Options' tab, which contains the following settings:

- Email address**  
This is the email address we'll use to contact you. It is not shared publicly.
- Time zone**  
Identify your timezone to ensure that dates are shown relative to your location.
- Date format**  
Select your preferred format for representing dates.

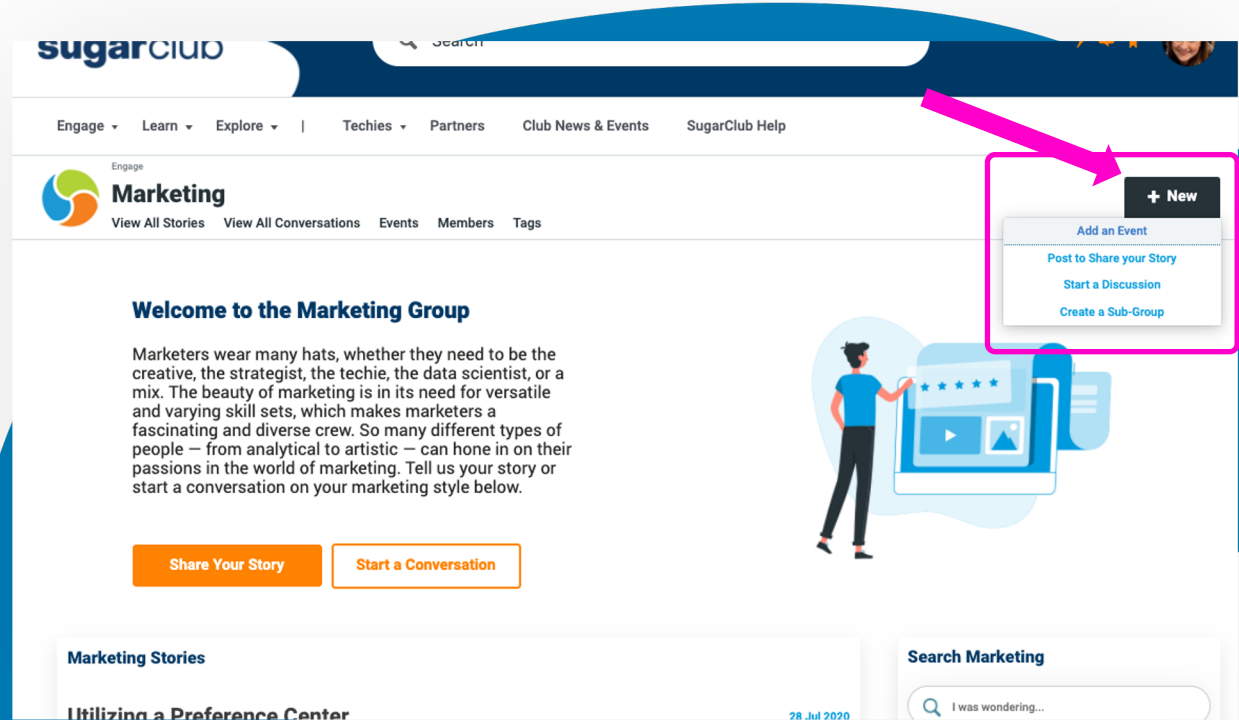
Below the highlighted section, there is a setting for 'Allow private messages from' with three radio button options: 'No one', 'Friends Only' (which is selected), and 'Everyone'.

# Joining Groups

- Click banner
- Control notifications & subscriptions
- Related and relevant content
- Wanted to give end-users full control over their experience
  - You control what you want to receive and the frequency in which you receive it.
- See: notification button in the menu bar



# Creating Content



The screenshot shows the SugarCRM Marketing group page. At the top, the SugarCRM logo is on the left, and a search bar is on the right. Below the logo is a navigation bar with links: Engage, Learn, Explore, Techies, Partners, Club News & Events, and SugarClub Help. The main header area features the 'Engage' logo, the 'Marketing' group name, and sub-links: View All Stories, View All Conversations, Events, Members, and Tags. A pink arrow points to a '+ New' button in the top right corner, which has opened a dropdown menu. The menu contains four options: 'Add an Event', 'Post to Share your Story', 'Start a Discussion', and 'Create a Sub-Group'. Below the header, the main content area has a 'Welcome to the Marketing Group' section with a paragraph about marketers and two orange buttons: 'Share Your Story' and 'Start a Conversation'. To the right of the text is an illustration of a person interacting with a large screen displaying a video player and a star rating. At the bottom, there are two sections: 'Marketing Stories' with a snippet titled 'Utilizing a Preference Center' dated '28 Jul 2020', and a 'Search Marketing' section with a search bar containing the text 'I was wondering...'.

sugarclub

Engage Learn Explore | Techies Partners Club News & Events SugarClub Help

Engage  
**Marketing**  
View All Stories View All Conversations Events Members Tags

**Welcome to the Marketing Group**

Marketers wear many hats, whether they need to be the creative, the strategist, the techie, the data scientist, or a mix. The beauty of marketing is in its need for versatile and varying skill sets, which makes marketers a fascinating and diverse crew. So many different types of people – from analytical to artistic – can hone in on their passions in the world of marketing. Tell us your story or start a conversation on your marketing style below.

Share Your Story Start a Conversation

**Marketing Stories**  
Utilizing a Preference Center 28 Jul 2020

**Search Marketing**  
I was wondering...

+ New  
Add an Event  
Post to Share your Story  
Start a Discussion  
Create a Sub-Group