SUGARCRM.

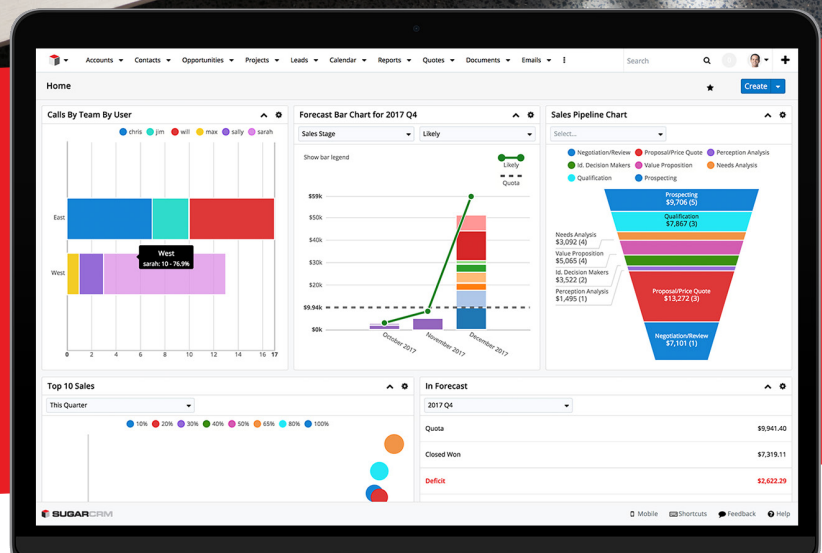# Sugar Product Brief

Create better business relationships.

SUGARCRM

Setting your business apart from your competition begins with better customer experiences.

Sugar empowers your entire organization to build better business relationships by consistently delivering great experiences to your customers.

Sugar is a complete CRM solution that helps you grow your sales, deliver effortless customer care, and run more effective marketing campaigns without unnecessary complexity or feature overload. Sugar's simple and modern user interface provides every employee with the right information, at the right time, before they even ask. This helps drive adoption, increases productivity, fosters collaboration, and enables better decision making.

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SUGARCRM.

Quicker Returns on Investment with Lowest TCO

Sugar is built with the core CRM features that matter most and can be managed as a single, complete CRM system without requiring investment in additional technologies to build out your CRM platform. Sugar's platform is built to drive ease of implementation and ease of integration. And with no hidden costs, it helps you realize quicker returns on your investment while reducing IT overhead and complexity.
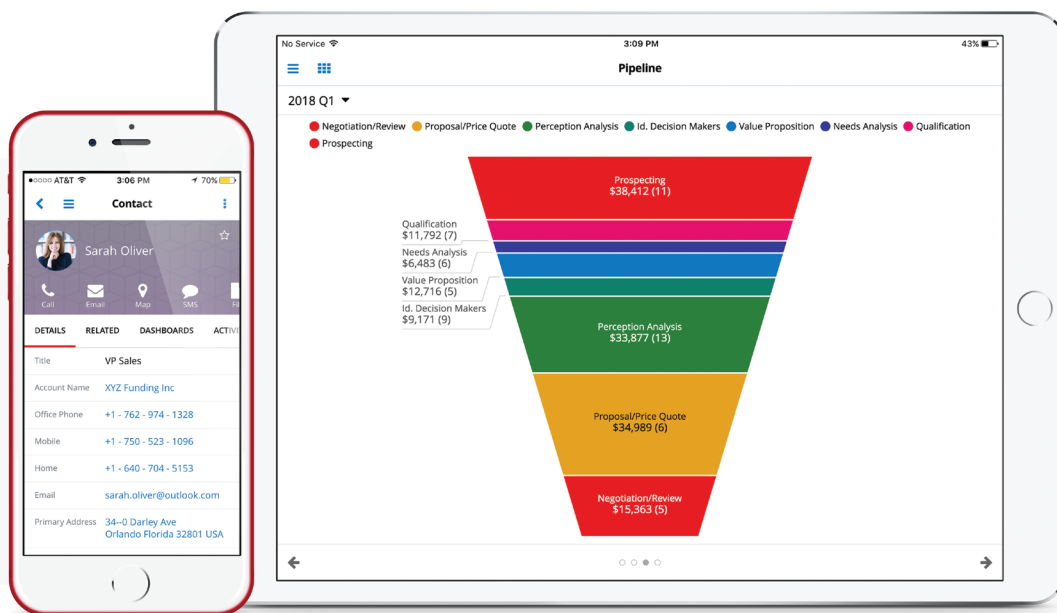
Improve marketing effectiveness by executing the right marketing strategy

- **Prospect and Customer Targeting:** Achieve higher conversion rates and deeper prospect engagement by executing targeted, personalized campaigns using segmented target lists

- **Campaign Management:** Execute multi-channel, multi-touch campaigns with Sugar's intuitive Campaign Management, and track every action and conversion across email, text, in-person events, or even via social media. Measure campaign effectiveness with rich dashboards and closed-loop tracking with leads through sales opportunity conversions.

Acquire, Qualify and Convert Leads more effectively

- **Lead management:** Quickly identify and track your hottest leads from multiple campaigns. Turn over the leads to sales seamlessly for faster lead to opportunity conversion.

- **Lead routing:** Define and automate processes that work best for your business. Visually design automation to route and track lead progress.

- **Sales campaigns:** Create, execute and track sales campaigns across multiple channels. Develop compelling email marketing programs and easily capture leads from your website.

Help your sales people close more deals

- **Account and contact management:** Get a complete view of your customers and prospects across the entire customer lifecycle to deliver the right impact in every conversation, based on their role and personal preference.

- **Opportunity management:** Increase your sales win rate by focusing on the right opportunities and prioritizing activities for each individual customer. Capture all pertinent details across the entire sales and customer lifecycle. Promote best practices. Stay engaged with easy access to information across any device.

- **Quote Management:** Improve quote accuracy and efficiency via drag-and-drop based quotations and easily send to customers electronically. Sell globally with multi-currency support - Work within your preferred currency while accommodating your customer's choice within the same quote proposal.

- **Sales collaboration:** Make use of the tribal knowledge across your whole organization. Easily identify and connect with experts across your organization. Enable discussions in the context of accounts, contacts and opportunities that are easily cross-referenced in the future. Increase knowledge sharing by allowing individuals to classify information in a manner that makes sense to them.

- **Sales Forecasting:** Create more accurate and predictable forecasts and track pipeline changes. Coach to success based on early insights on factors affecting pipeline. Implement the right sales strategy to drive quota attainment.

Turn customer service & support into customer satisfaction

- **Case management:** Serve customers on their terms through phone, email, and social channels. Resolve customer issues quickly by routing every case to the right agent. Get complete views of customer interaction across any channel.

- **Knowledge management:** Enable your agents to find right answers quicker. Let your agents and other experts create, maintain and publish knowledge base articles for maximum agent productivity and easy customer self-service.

- **Self-service:** Empower your customers and save time and money with effortless self-service tools. Let customers create new support cases and provide fast access to case status and knowledge base articles.

- **Expert collaboration:** Harness collective wisdom through collaborative service. Easily identify and connect with experts across your organization. Enable context-sensitive discussions that are easily cross-referenced in the future. Increase knowledge sharing by allowing individuals to classify information in a manner that makes sense to themselves.

Boost productivity

- **Mobile:** Work seamlessly with no-cost native apps for iOS and Android, plus Sugar's mobile browser support for any smartphone or tablet.

- **Use your existing business apps with Sugar:** Microsoft Outlook, Gmail, IBM Notes, Twitter and more

- **Best-in-class business process automation:** Streamline and automate your company's processes across sales, service, and marketing using a visual process designer. Design multi-step processes, business rules, and workflows like approvals and escalations without any coding.

Make insightful decisions

- **Dashboards:** Get business insights like marketing analytics, sales trends, case reports, and customer profiles with real-time performance dashboards personalized to your needs and preferences.

- **Advanced Reporting:** Create real-time reports and dashboards on any metric and manage access, without having to rely on administrators. Easily define and share reports, charts, and graphs that capture critical metrics.

- **Sales Analytics:** Get real-time information about pipeline, quota attainment, key opportunity and account activity, and sales-rep performance against targets.

- **Customer service & support analytics:** Monitor and track customer support performance in real time with key insights like case response times, case loads and agent performance.

Get unparalleled control and choice with Sugar's flexible and open architecture

- **Flexible, Easy to Integrate Platform:** Integrate seamlessly with your business applications using Sugar's REST API. Adapt Sugar to your business with unparalleled application configurability and minimum to no programming. Reduce costs and lower risks with Sugar's industry standards based architecture.

- **Flexible Deployment:** Select the best deployment option for your business. Choose from the broadest deployment options including public cloud, private cloud and on-premise.

- **Global Enterprise Deployment:** Deploy anywhere with multi-currency support, over 30 languages included and many more additional language packs available.

Ensure regulatory compliance and meet growing consumer demand for data privacy

- **Data Privacy Management:** Comprehensive data privacy management in Sugar enables your organization to record, process and respond to data privacy requests at scale.

- **Managing Consent:** Manage the consent process for storing and processing personal data.

- **Personal Information Log:** The PI Log delivers a snapshot of personal data related to data subjects, and the sources of the data, which can be sent to the subject on request.