

SUGAR.CRM

**Commercial Open Source
Customer Relationship Management**



Clint Oram
Open Source Project Director



- **What is CRM?**
- **Who is SugarCRM?**
- **Why CRM and Open Source?**

What is CRM?



Sales

(Sales Force Automation)

- Contact Tracking
- Opportunity Mgmt
- Quotas & Forecasting

Customer Relationship Mgmt

- Business Process Automation
- Customer Insight
- 360° View of the Customer

Customer Service

- Case Tracking
- Self-Service
- Knowledge Base
- Email Response

Marketing

- Campaign Mgmt
- List Mgmt
- Email Marketing

History of CRM



- **1970 – 1995: Customer Service was CRM**
 - Airline call centers and the green screen
- **1992: Along Comes SFA**
 - The road warrior armed with a laptop
 - Client-Server takes off
- **1997: Marketing Automation Debuts**
 - Spam is no longer just a breakfast food
 - Data warehouses and data marts get packaged
- **1999: Sales, Service and Marketing**
 - The new CRM
 - Web-based interfaces
- **2001: CRM and ASP's Find Each Other**
 - Failed multi-million \$ implementations
 - The business does an end-run around IT



- **2004: Open Source Redefines CRM**
 - No more vendor lock-in
 - Dramatic reduction in risk
 - Successful on-premise deployments at lower costs
 - IT Departments are re-empowered

SUGAR.CRM launched!

SUGAR.CRM Founders



John Roberts

Clint Oram

Jacob Taylor

BROADVISION



OCTANE
SOFTWARE

Baan

E.PIPHANY



AURUM

Verity



symantec.



invent

Closed Source Innovation



End Users

Business Analysts

IT

Partners

Field

New Customers



PM



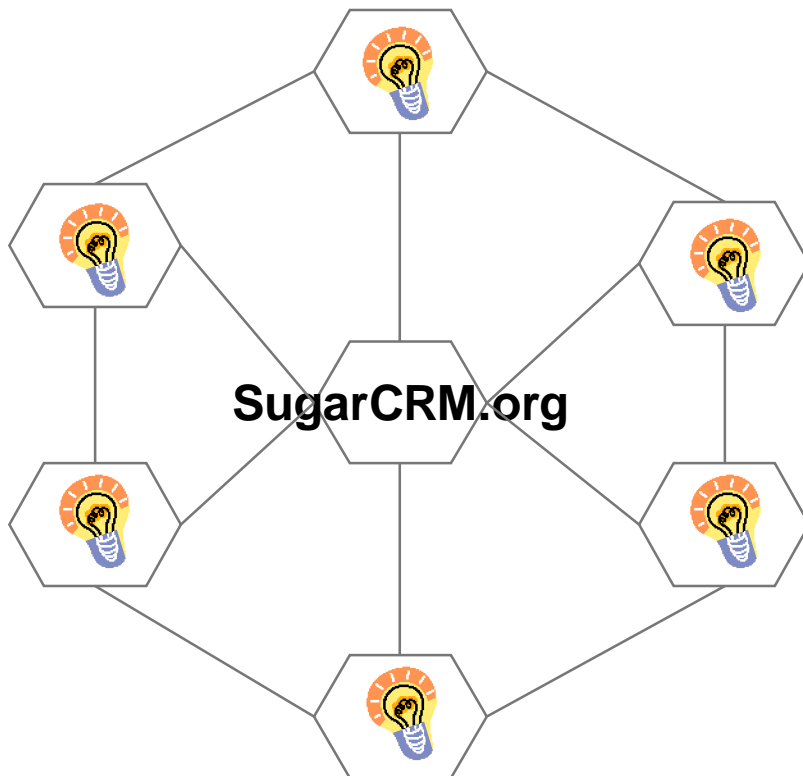
Eng.



Traditional Closed Source

- **One Development Org**
- **One Release, Limited Visibility**
- Equals **Limited Innovation**

Open Source Innovation



SugarCRM Open Source

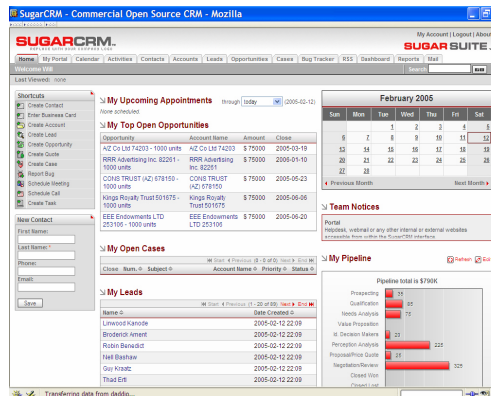
- **Worldwide Shared Development**
- **One Core Release, Open Visibility**
- **Open Code Repository**
- **Equals Unlimited Innovation**

Sugar.Suite Value Proposition



User Adoption
UI-Templates
UI Speed

SUGAR.SUITE



Deployment Options
On Premise
Appliance
Hosted

Cost of Ownership
15% of Proprietary
Solutions

Architecture
Linux, Apache, PHP, MySQL
Source Code Provided
Distributed Development
Ecosystem

The Real Cost of Traditional CRM Systems

Customers pay for licenses whether the solution adds value or not

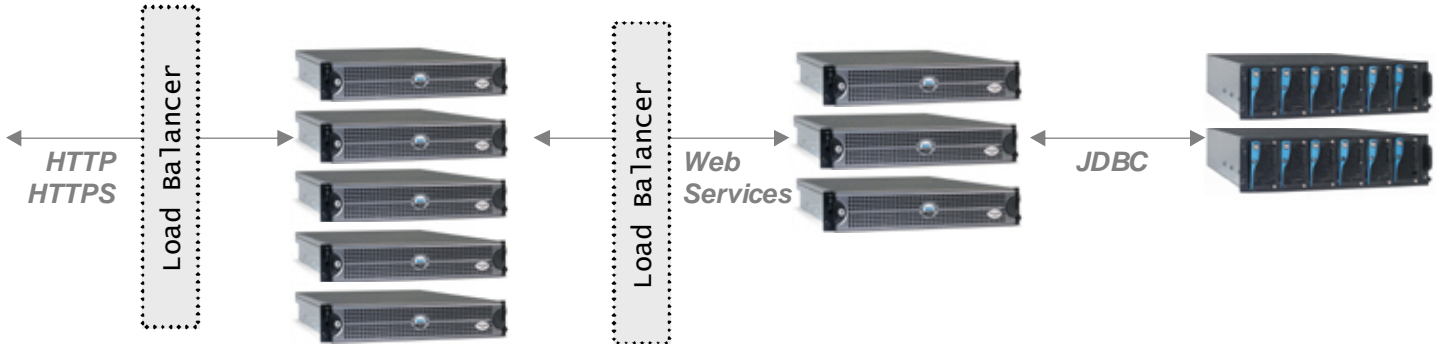
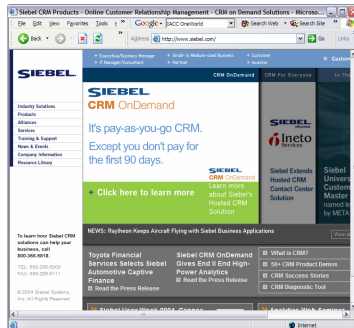


End Users UI's

Web Servers

App Servers / Server OS

DB Servers

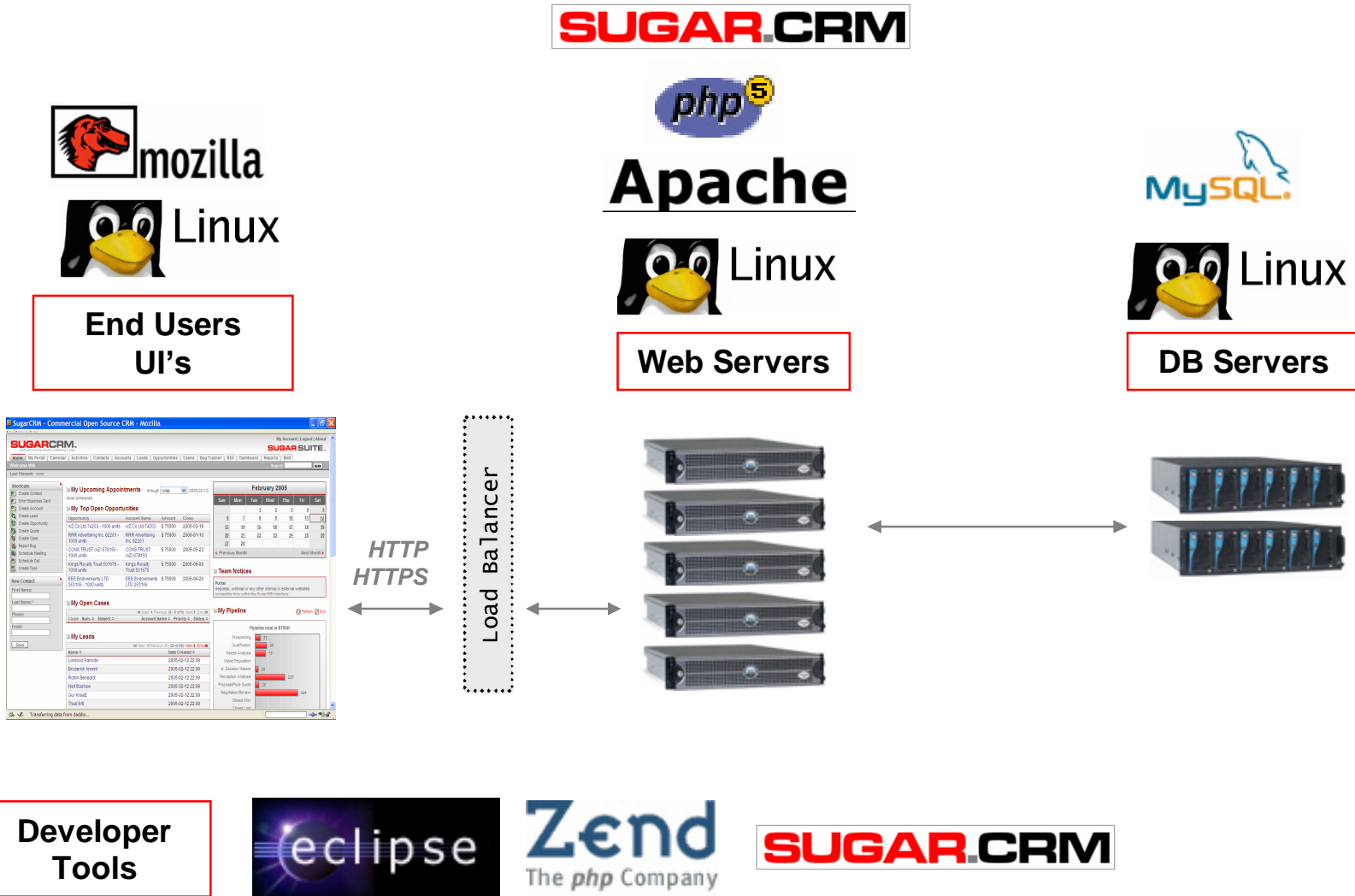


Developer Tools



The Real Cost of **SUGAR.CRM**

Customers only pay for software that adds value



Get Involved

Become a Sugar Recognized Developer!

- www.sugarcrm.com
 - Test drive the demo
 - Download the software
 - Dev Zone launches this week
- dev@sugarcrm.com
 - Contact the dev team

The screenshot shows the SugarCRM website in a Mozilla browser window. The browser title is "CRM Software - SugarCRM - Commercial Open Source CRM Software - Sugar CRM - Mozilla". The website header includes the SugarCRM logo and the tagline "Commercial Open Source Customer Relationship Management". Navigation links for "Products", "Demo", "Download", and "Store" are visible. A search bar is located in the top right. The main content area features a large banner for "SUGAR SUITE 2.5™" with the headline "CRM Customizations Made Easy". Below the banner, there are three buttons for "View an automated demo": "Homepage Customizations", "Tab Layout", and "Field Layout". The banner also lists key features: "Point, Click & Save", "Coding Not Required", and "Upgradable". Below the banner, there are four product tiles: "Sugar Suite", "Sugar On-Demand", "App Pack", and "Sugar Cube". Each tile includes a brief description and a "Learn more now" link. At the bottom of the page, there is a "News" section with a table of recent updates.

Date	Update	Date	Update
2/11	Events: See us at Linux World	1/27	New Links Theme is Available
2/11	Careers: Marketing	1/27	Careers: Sales
2/7	Careers: Release Engineer	1/20	Introducing Sugar Professional 2.5

Contact Information

SUGARCRM

Clint Oram

Co-Founder & Open Source Project Director

clint@sugarcrm.com

+1 408.873.0872