



ARchitect User Forum

Leveraging ARchitect for Reporting Dashboards

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December 7, 2021

Agenda

- Introduction, Background
- All About SugarCRM
- Program Alignment & Goals
- Leveraging ARchitect to Drive Reporting Process
- Examples / Demo
- My Best Practices Using ARchitect
- Q&A

About me



Sarita Kincaid

Sr. Dir., Analyst Relations
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- Diverse high-tech marketing background – AR, PR, Strategic Marketing, MarCom, Employee Communications
- Found AR by accident
- Most rewarding AR experience – leveraging analysts to get industry wireless standard socialized and ratified!
- Most challenging AR experience – navigating geo-political issues affecting company and AR program
- ARchitect user since 2008!

ORACLE



**BIG
BAND**
networks



QUALCOMM

Davis Wright
Tremaine LLP



SugarCRM

About SugarCRM

Background

- Founded in 2004
- Headquarters: Cupertino, CA
- Privately owned: Accel-KKR
- 500+ employees
- Solutions offered in 26 languages
- Grew from open-source SFA offering to cloud-based full suite (SFA, Marketing Automation and Customer Service)

Fun Fact!

SugarCRM was named by John Roberts, one of three founders, while riding his bike (named “Sugar”) in the Santa Cruz Mountains.



This Is Sugar

Let the platform do the work

Invested in Customer Success



4,500+
Companies



120
Countries



90+
NPS Score

Global Team of Experts



7 Global Offices



500+ Employees



200+ Channel & Integration
Partners

Platform to Grow and Scale

market

sell

serve

Software Reviews, Emotional Footprint CRM, Champion



Trusted by the Market



8x Visionary, Gartner
SFA Magic Quadrant

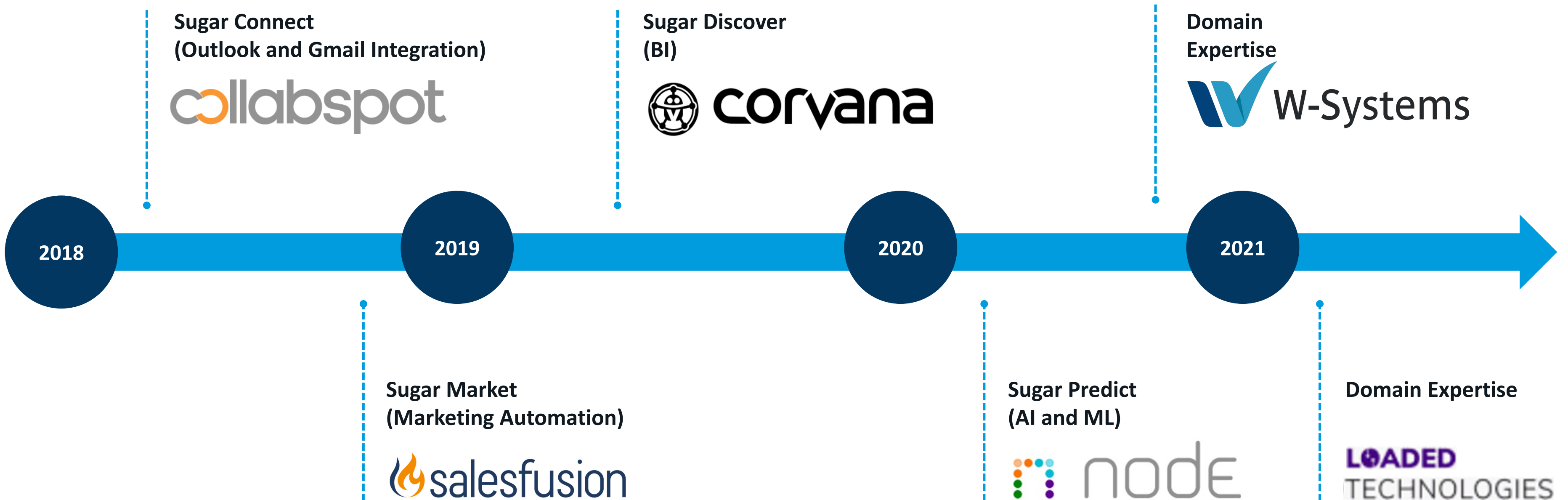


G2 Mid-Market CRM
Leader



Hot Company to Watch
2021, Nucleus
Research

Sugar's Recent Acquisitions

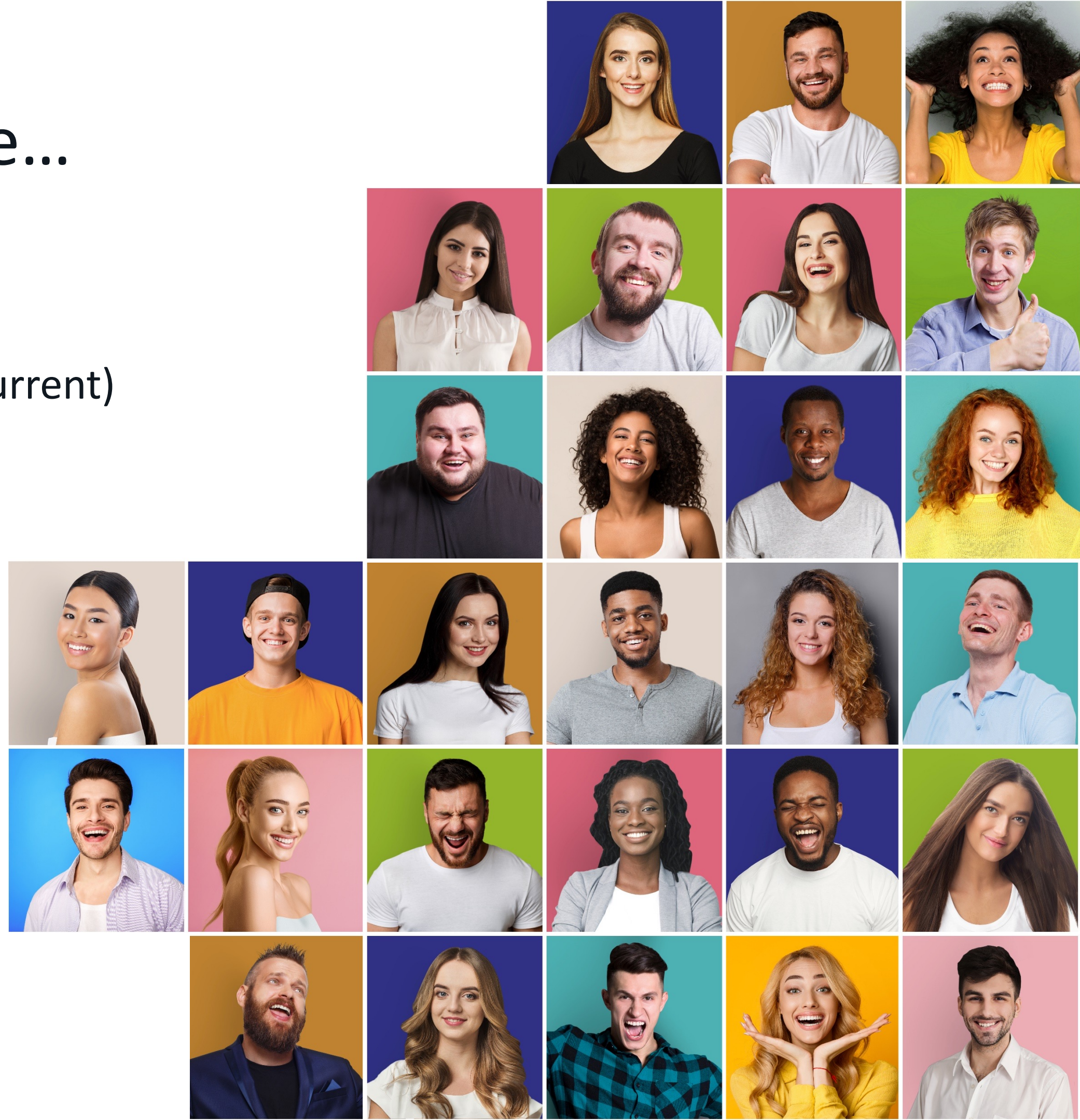




AR Program Alignment & Goals

AR “Team”: It Takes a Village...

- Me
- Part-time contractors (late Summer 2021-current)
- Rest of our (extended) “AR Team”:
 - Product Management
 - Product Marketing
 - General Managers
 - Sales Leaders
 - Regional Marketing
 - Content & Creative Marketing
 - PR Agency
 - Customer Reference Team
 - Executive Staff



AR Program Goals

High-Level Priorities



Accelerate Sales



**Increase
Brand Awareness**



Position as a **Leader**
in the CRM Mid-Market

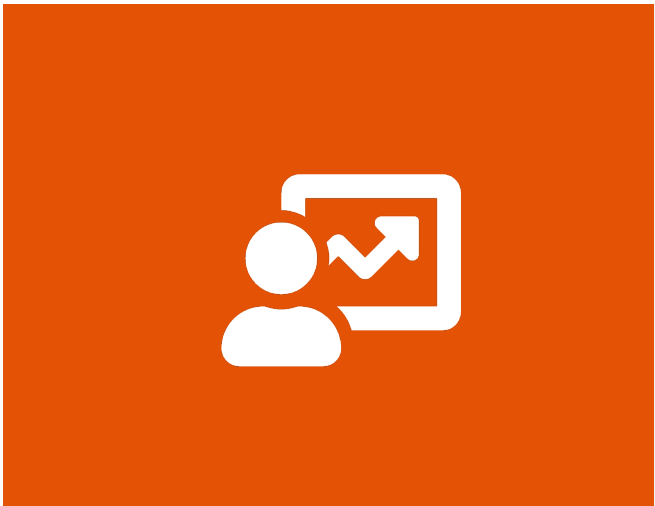


Extend Reach

#1 AR Program Challenge: Bandwidth



Increasing AR Outreach



M&A Activity



Spokespersons



AR / Sales Program

ARchitect for AR Ops!

We leverage ARchitect for:

- Real-time reporting:
 - research
 - analysts
 - social media / blogs
- Program insights:
 - workload
 - perception
 - alignment with initiatives
- Market insights:
 - SOV
 - trending topics





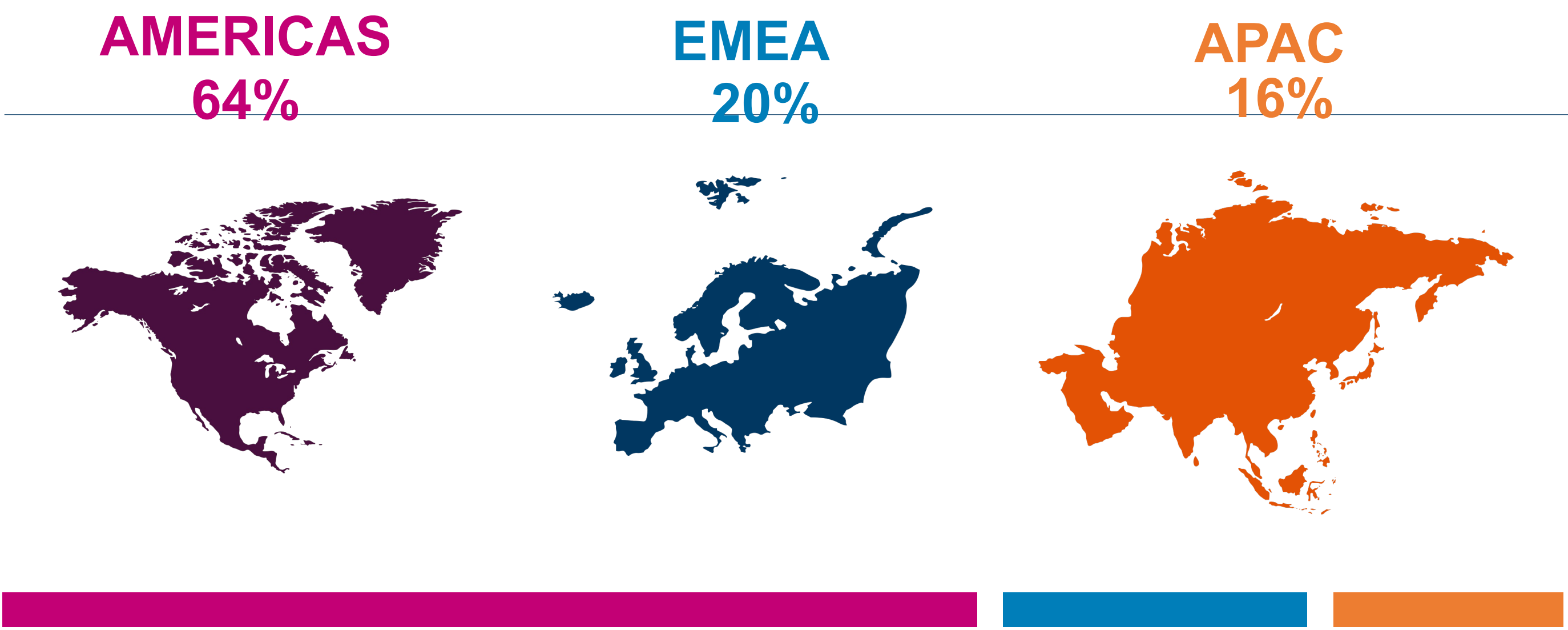
Leveraging ARchitect

ARchitect Calendar: How I Use It

Today ◀ ▶ 📅 December, 2021						
Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
28	29	30	01	02 Messaging - Deeper Look into Value	03 Factual Review Draft Sent	04
05	06 Post Analyst Summit Discussion re:	07	08	09 Guidance on Expanding Program	10 In-person Lunch 1:1	11
12	13	14 SAS Prep Call	15 CEC MQ Kickoff NowTech to Publish (CRM)	16	17 Potential New Market Feedback	18
19	20	21	22	23	24	25

All Interactions >>

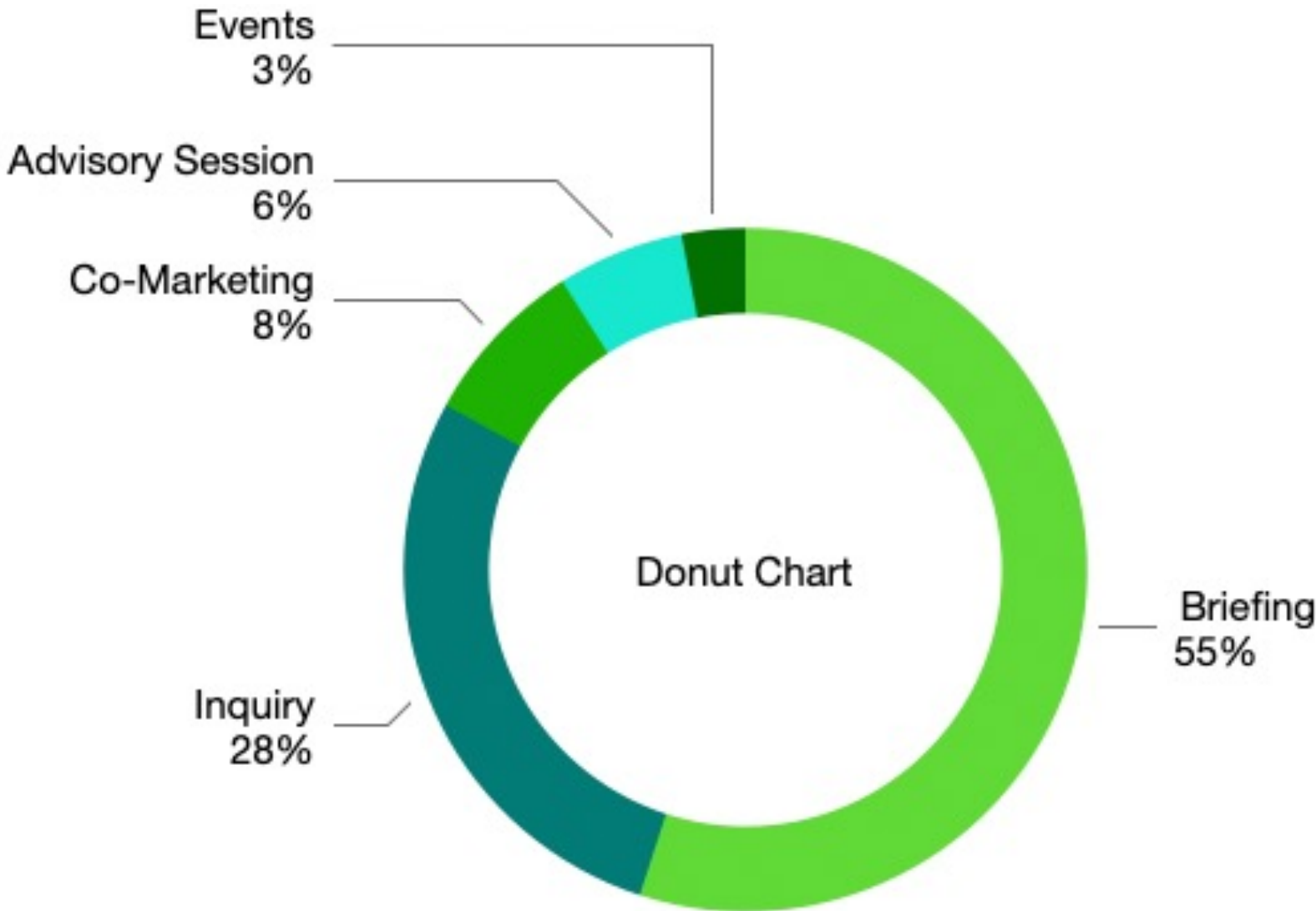
Keeping Tabs on Program Reach



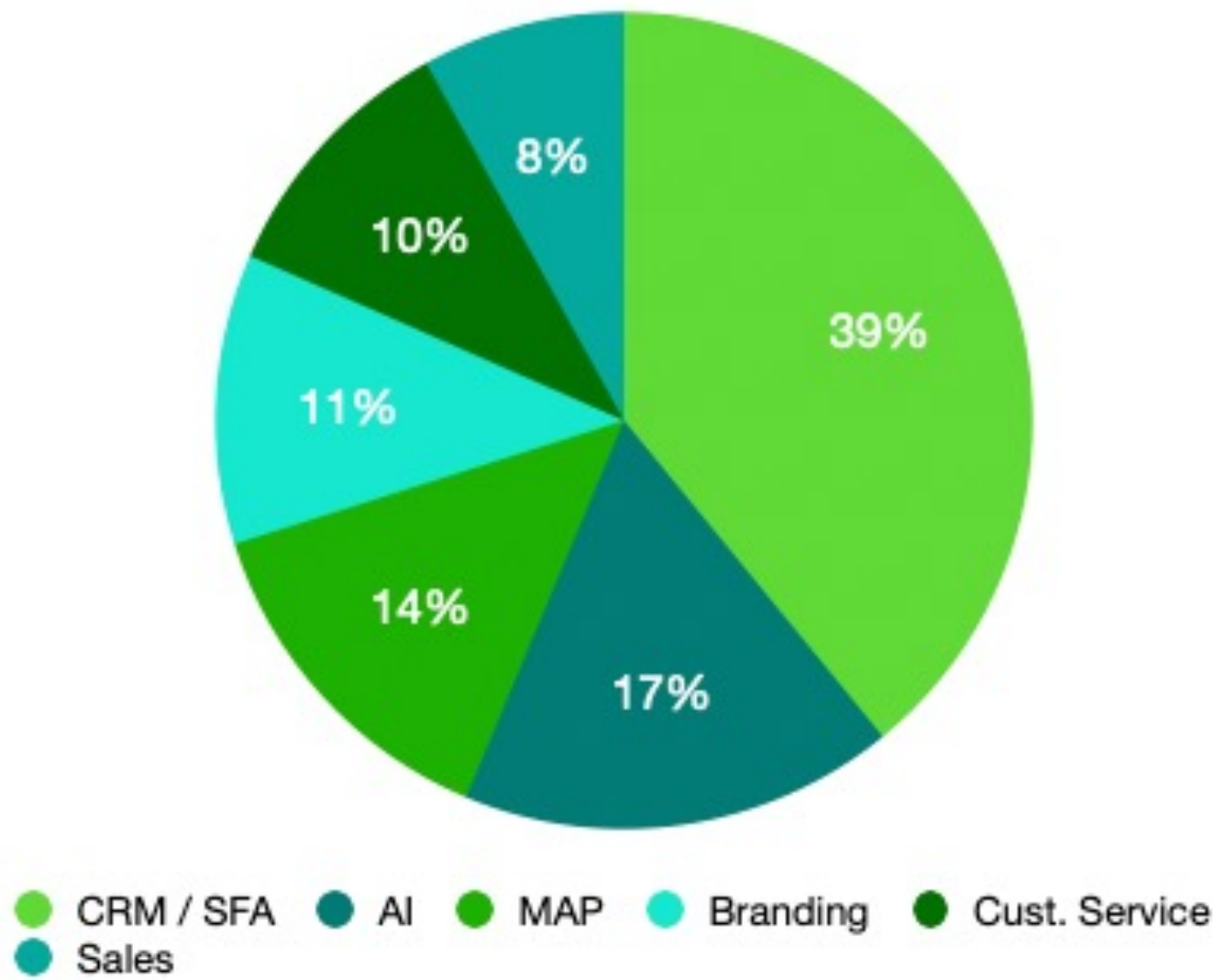
- AMERICAS**
 - United States
 - Canada
 - Mexico
- EMEA**
 - France
 - Germany
 - Netherlands
 - Spain
 - South Africa
 - UK
- ASIA**
 - Australia
 - China
 - India
 - New Zealand
 - Malaysia
 - Singapore
 - South Korea
 - Taiwan

Tracking Interactions

Interaction Type



Topics

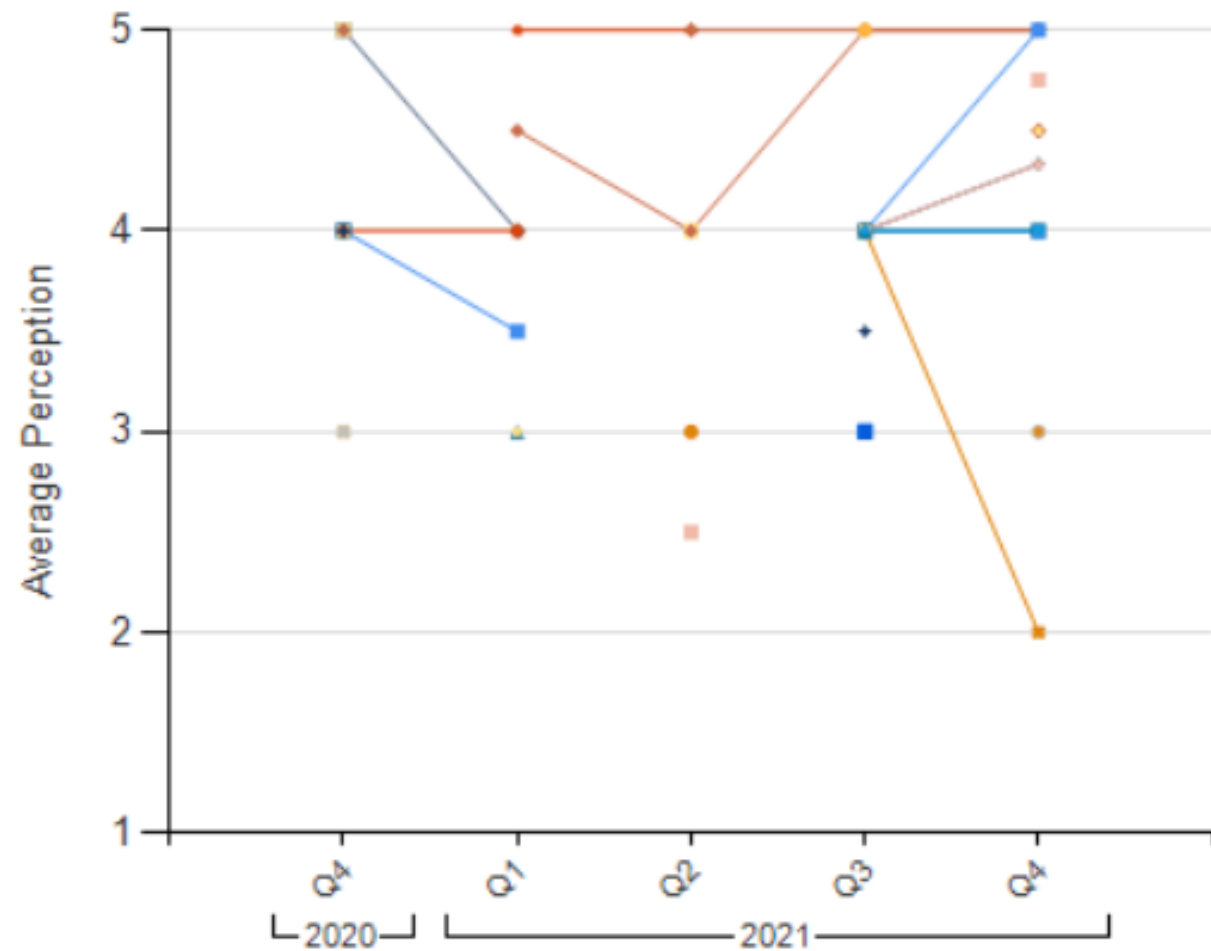


Perception Reporting

4.2 / 5.0

Interactions

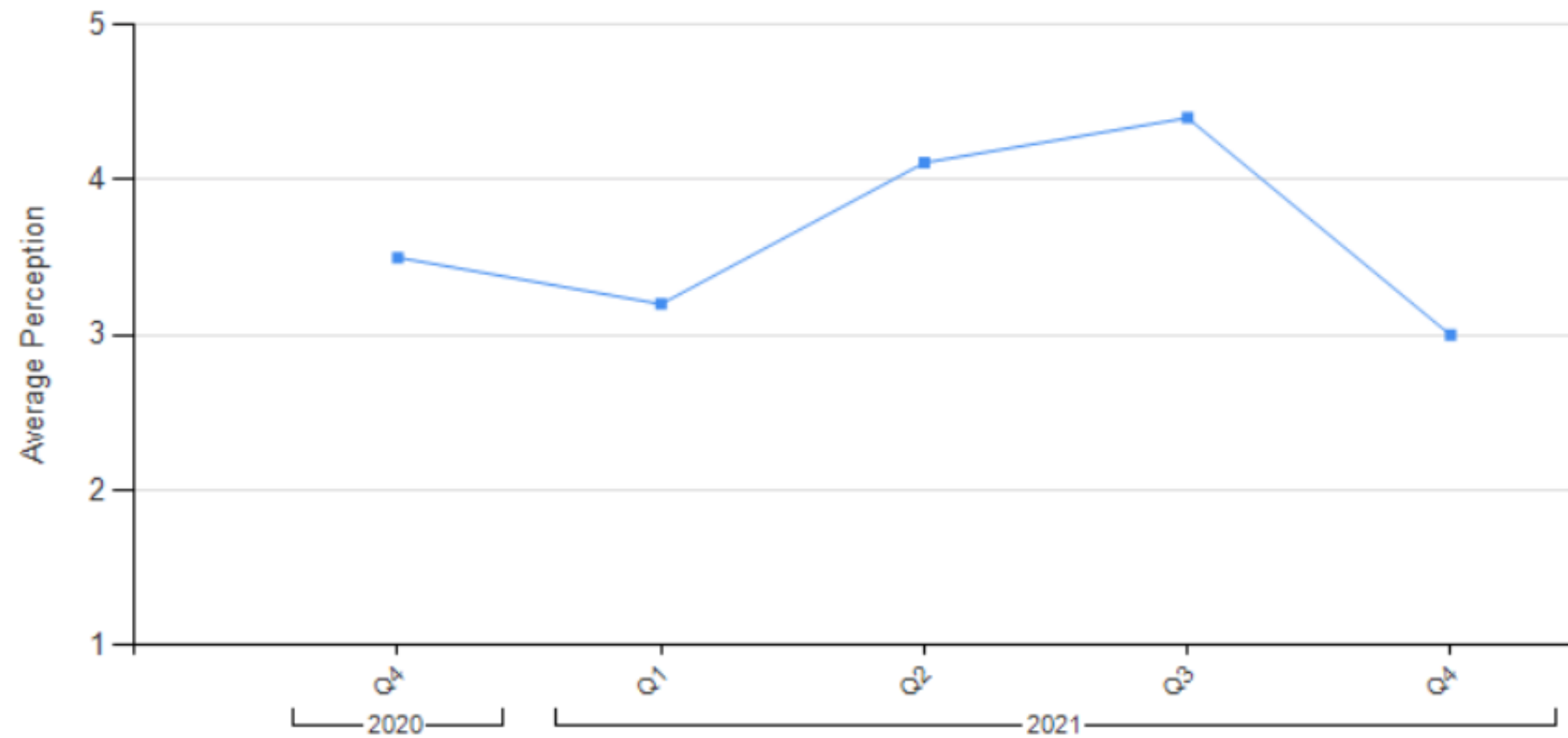
Perception Trends



3.8 / 5.0

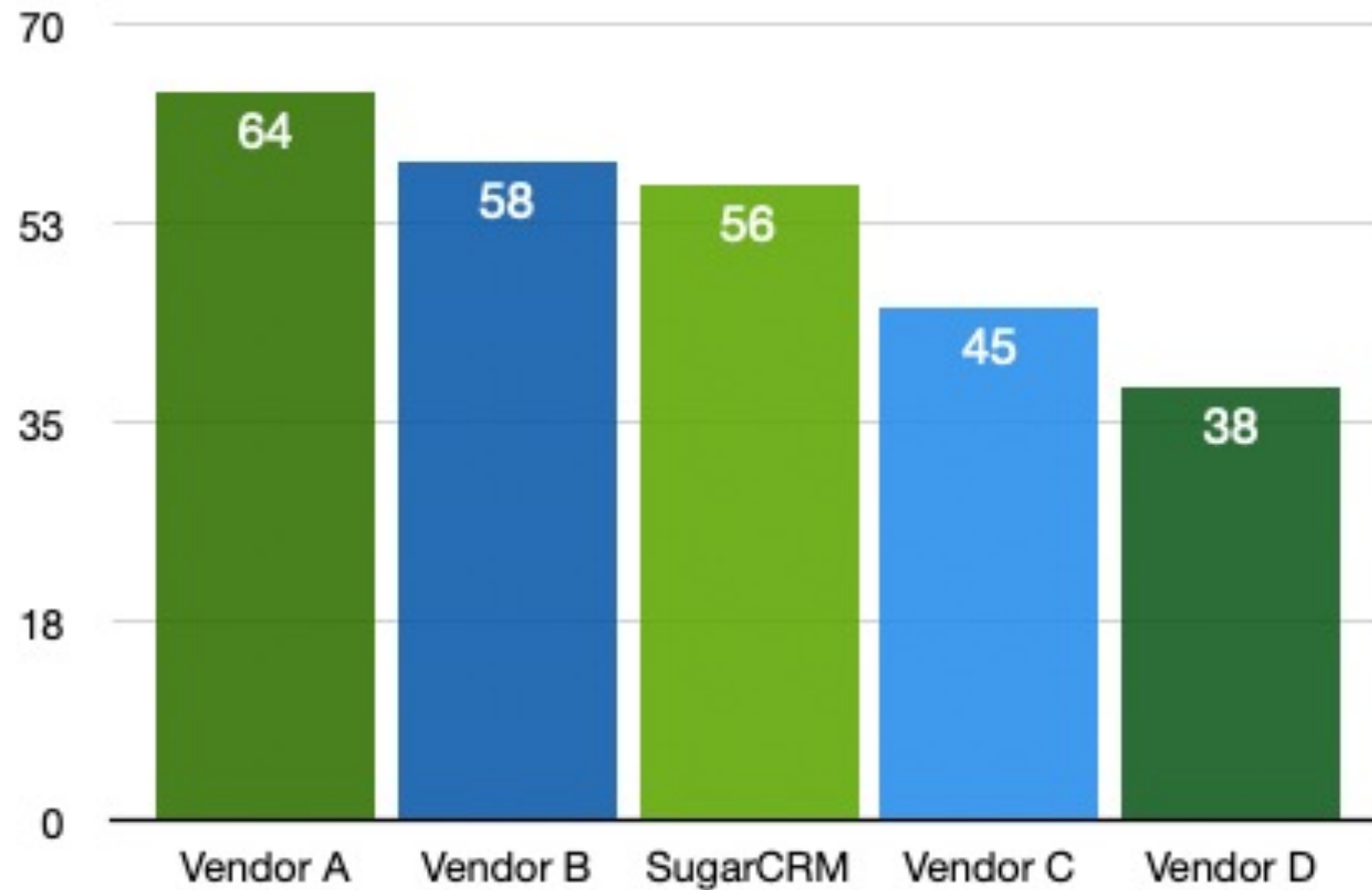
Research

Perception Trends

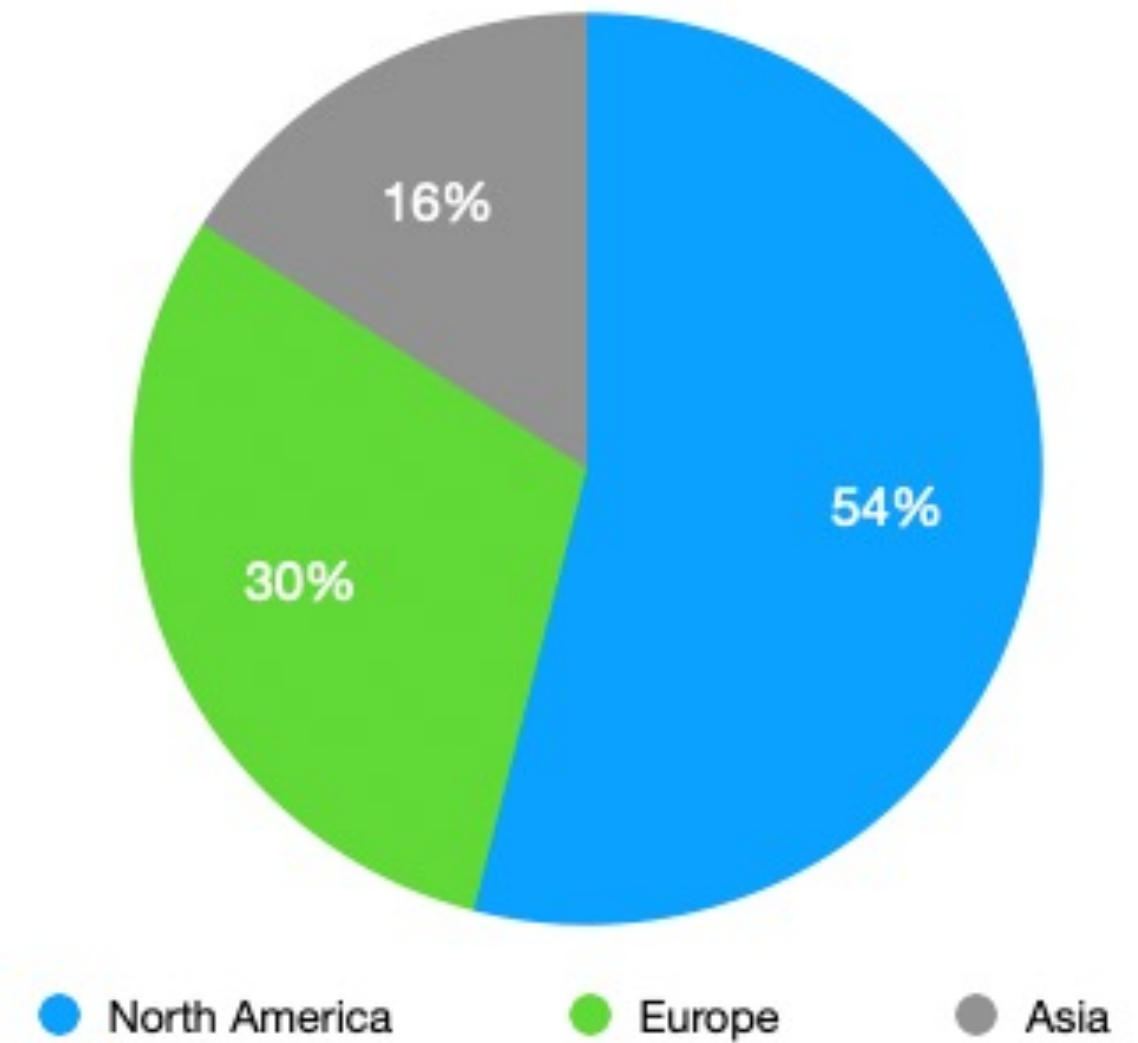


Determining SOV (Research)

Top 5 Mid-Market CRM Vendors



Geographic Coverage: SugarCRM



Using ARchitect to Store Program Info

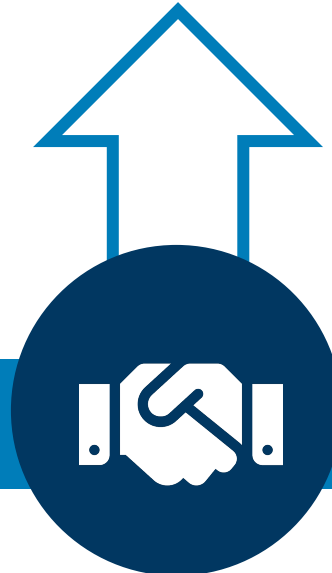
Industry Analyst Feedback (Nov. 2021)

94%



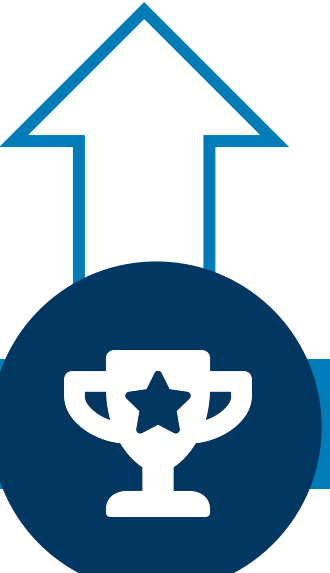
Perception of Sugar **improved** in past year

80%



More likely to recommend Sugar to end users

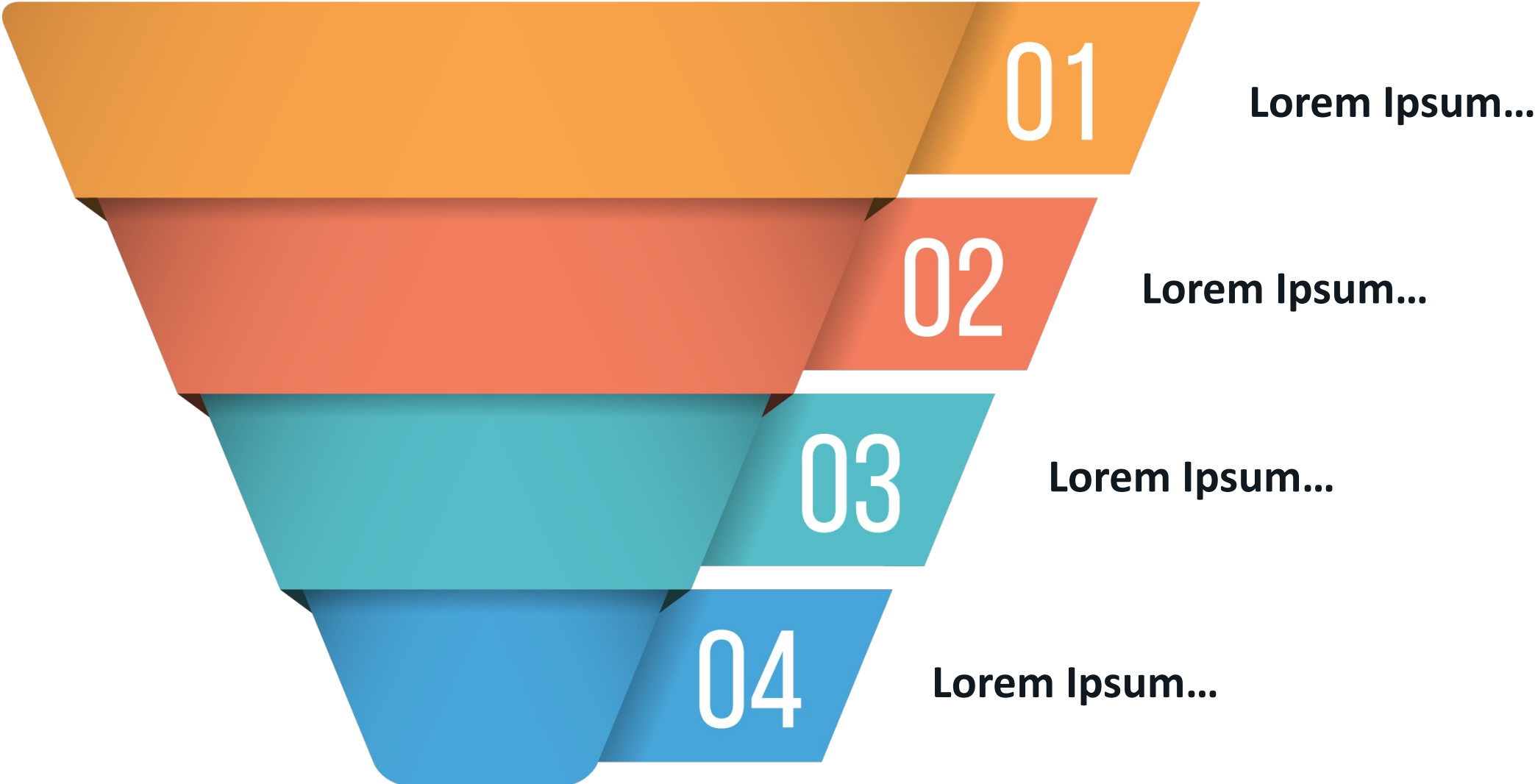
56%



Consider Sugar a **Leader** in CRM mid-market

*Annual Survey Metrics: Y / Y Improvements

Using ARchitect to Track MQLs / Revenue





Recommendations

Recommendations for Using ARchitect

- It's all about the data: more = more!
- Tag and assign perception to interactions
- Use “projects” to simplify and streamline reporting
- Leverage Premium Content & Articles
 - surprises / opportunities for future report inclusions
 - assign sentiment / perception
- Use custom fields for company-specific reporting



Questions?



| **Let the platform do the work**

www.sugarcrm.com