



CRM Software Review



About this Review

Thank you for requesting this executive summary of ISM's comprehensive CRM Software Review for SugarCRM. Since 1989, ISM staff has tested dozens of software packages annually from CRM vendors around the world. Each review is currently based on 179 criteria, drawn from input we've received from senior executives and sales, marketing and customer service personnel. ISM receives no money from any vendor it reviews, to ensure 100% objectivity. Vendors must fully demonstrate their functionality for each criterion.

About ISM

Since 1985, ISM has created & implemented strategies to delight the customers of best-in-class organizations worldwide. ISM provides solutions that maximize user-adoption, ensure seamless collaboration between customer-facing functions and enhance customer engagement. We combine strategic vision with powerful technologies and tools to deliver actionable strategies that lead to an optimized customer experience, improved customer service, better-calibrated marketing programs and ultimately, to increased customer acquisition, retention & growth. Let us review your current customer-facing technology programs and activities, and ready your organization for 2030 and beyond.

Contact us for the full, detailed 20-page CRM Software Review for SugarCRM or any of 30 other major CRM applications.

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SugarCRM at a Glance:

Business Functions

Contact Management	✓
Account Management	✓
Sales Management	✓
Time Management	✓
Customer Contact Center	✓
Customer Service	✓
Telemarketing/Telesales	✓
Marketing	✓
Lead Management	✓
Business Analytics	✓
e-Business	✓
Project Management	✓
ERM	
Field Service	✓
Mobile CRM	✓
Social CRM Functionality	✓
Real Time Features	✓
User Friendliness/Support	✓

Evaluation of Business Functions



Strengths:

- Contact profile
- Quote generation
- Opportunity management
- Native calendar
- Contract profiles
- Campaign management
- Marketing encyclopedia
- Lead profiles
- Information feeds
- Dashboard
- Project profile
- Social CRM functionality
- Open source customization

Weaknesses:

- Lack of ERM
- Limited Customer Contact Center
- Limited Marketing
- Limited e-Business
- Lack of order management
- Lack of call scripting

Executive Summary

SugarCRM is a CRM solution that is offered in an on-demand, partner-hosted and on-premise editions. The CRM solution has good functionality in contact, account, sales, time, lead and project management and good functionality in customer service, field service, telemarketing, PRM, business analytics and Social CRM features.

SugarCRM includes a tool called “Studio” which allows the administrator to view the entire table structure of the SugarCRM database. From within Studio, the administrator is able to create, and update fields and form objects. The administrator can also change the layout of various forms and the views used throughout the application as well as define new relationships between tables. A Visual Designer is available to graphically create workflows and business processes.

Contact management, Account management, Sales management

Contact management features provide users with contact profiles with predefined fields for contact information. Contacts can additionally opt out of providing certain information within their contact profile such as Email address. Account management features offer users account profiles with predefined fields for account information. Quotes can be created within the Quotes tab of a contact or account profile. Sales management features include opportunity profiles with predefined fields for opportunity-related information. The user can access opportunity report templates for opportunity reporting. Sales cycle analysis is available via Sales Pipeline reports for an opportunity. Territories can be automatically assigned to sales reps via workflow configuration.

Time management

Time management provides for a native calendar with daily, weekly, monthly and yearly views. Appointments on the calendar can be linked to accounts, contacts, cases, leads, opportunities, projects, quotes, products and tasks. The native calendar can be integrated uni-directionally with MS-Outlook. Customers can log in the SugarCRM Self-Service portal for customer self-service.

Customer service

Customer service functionality includes case profiles with predefined fields for case-related information. Cases can be automatically routed and escalated to the appropriate staff by workflow customization. Incident reporting is available via case report templates. Contract profiles can be used for service level agreements or warranty management. Field service is available via iPhone, iPad or Android device integration. Campaign management is available via a Campaign Wizard in which users can set up marketing campaign steps and tactics. The Documents tab provides for marketing encyclopedias and document management.

Lead management

Lead management features offer users lead profiles with predefined fields for lead information. Leads can be imported from external Comma Delimited Files. Business analytics include 33 predefined report templates in the built-in SugarCRM reporting package. Graphical charts and forecasting functionality are available on the SugarCRM Dashboard. Project management offers users project profiles with predefined fields for project information. Gantt chart functionality is available to track project tasks/deliverables.

Social CRM functionality

Social CRM functionality includes the ability to set up a direct link to a LinkedIn profile for a contact via clicking on the LinkedIn icon within a contact profile. Users can access a direct link to the SugarCRM Forum, Blog, Sugar Forge (SugarCRM developers' forum) as a means of communicating with others on SugarCRM topics or issues. Mashups are available via integration with Google Maps. The user can additionally set up widgets showing information from external Websites on a dashboard or portal page. SugarCRM users can access a direct link to the SugarCRM Support or Developer wiki database to submit changes or comments to be added to each entry within the SugarCRM wiki database. Podcasts concerning SugarCRM issues or topics are available within the SugarCRM Forum and SugarCRM Community.

Limitations

SugarCRM lacks ERM functionality. The SugarCRM application is limited customer contact center, marketing and e-Business features.

Contact

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Company Profile

YEARS IN BUSINESS	12	PRICE – MULTI-USER	Vendor Disclosed
NUMBER OF EMPLOYEES	250+	SERVER	No charge for the server
LICENSED SEAT/USERS SOLD – LAST 12 MONTHS	Vendor Disclosed		
TOTAL NUMBER OF CUSTOMERS	4,500 companies		
LANGUAGES AVAILABLE	75 different languages		
LIST OF RESELLERS	See the SugarCRM Website for a list of resellers		