



WEBINAR

PROVIDENT



HOW TO AUTOMATE YOUR SALES PROCESS AND SAVE TIME



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Sales & Marketing Director
at ProvidentCRM



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Senior Account Executive
UK & Ireland at SugarCRM

WEDNESDAY | 21.10.2020 | 2PM (IST)

www.providentcrm.com

Agenda

- Provident CRM
- Sugar CRM
- Boosting Productivity
- Promoting Best Practices
- Anytime, Anywhere Access
- Better Leverage Data
- Q&A

ProvidentCRM

ESTABLISHED IN 2000

Provident was established in 2000, initially based in Dublin - Ireland.

MULTI DISCIPLINARY ORGANISATION

Wealth of experience in implementing and operating CRM strategy and applications.

FOCUS ON CRM & TEAM MANAGEMENT

Strong team focused on CRM & Team management. Based in Ireland, the UK, Spain, and Portugal.

PARTNER

SugarCRM Elite Partner - EMEA partner of the year in 2017, 2018 and 2019.



Services



CONSULTING



IMPLEMENTATION



INTEGRATION



TRAINING

PROVIDENT

SugarCRM

ESTABLISHED IN 2004

SugarCRM has their HQ in Cupertino, California but has expanded to offices around the world.

GROWTH FROM OPEN SOURCE

Historically an open source CRM, Sugar has evolved to offer a full suite of products focusing on the full customer experience including Sugar Market, Sell & Serve.

FOCUSED ON INNOVATION

Acquired by investment firm Accel-KKR, Sugar continues to add new technology to it's offering with 5 acquisitions over the last 18 months

SugarCRM



Time-aware Customer
Experience Platform



Lifelong Commitment
To Customers



No-touch Information
Management



Continuous
Cloud Innovation

The Game of Sales is Changing



Buyer Expectations Are Changing

73%

Of B2B buyers want a
personalized, B2C-like
experience

(Accenture)

50%

Of B2B buyers say the decision
process is longer, and more
involved in 2018

(Business2Community)

42%

Sales Reps say Prospecting is
Most Difficult Aspect of Job

(State of Inbound Survey)

Boosting Productivity





Can Your Sales Solution Do This?

- Help sales reps get ready for a prospect call in minutes, not hours
- Allow for effective collaboration across the organisation
- 360 degree view. Past, present and upcoming activities and engagement.

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Rich Green
CPO

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Education: MA/BA from State University of New York at Alba...

Previous Jobs: Chief Product Officer and CTO, SugarCRM

Facebook Link: www.facebook.com/people/_/602325938

Twitter Link: www.twitter.com/T32B

SugarCRM
sugarcrm.com

Company Size: 450
Industry: Internet Software & Services
Company Location: 10050 N Wolfe Rd, Cupertino, CA 95014, USA
Annual Rev
Company Description: SugarCRM is a software company based in Cuper...

NAICS Code: Professional, Scientific, and Technical Services (54)
SIC Code: COMMUNICATIONS (48)
FY End
Year Founded: 2004
Company Facebook: www.facebook.com/7151687461
Company Twitter: www.twitter.com/SugarCRM
Industry Tags: Information Technology & Services, Technology, ...

Show less...

News All News

SugarCRM Blog 4 days ago

SugarCRM Blog Why Your Sales Team Isn't Using Your CRM

Delivers Key Information Right Within Sugar

- Save contact and account research time

One-Click Data Import

- Spend less time on manual data entry and more time selling

Deep Contact Insight

- Create rich customer interactions with greater context

News and Related Information

- Drive more opportunities by reaching out at the right time

Promoting Best Practices

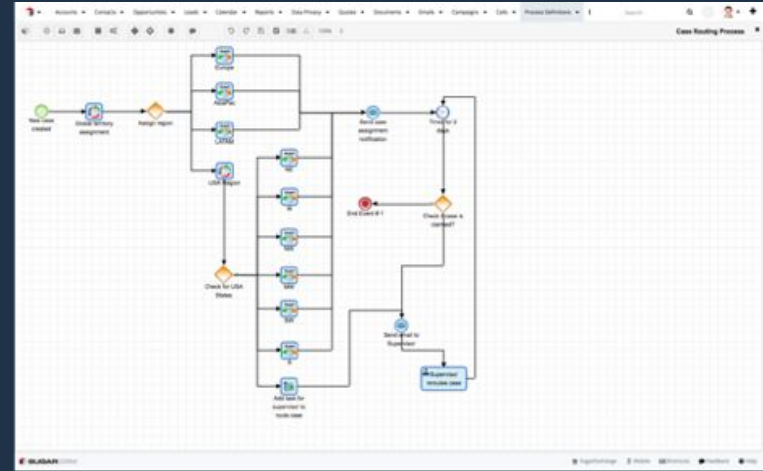




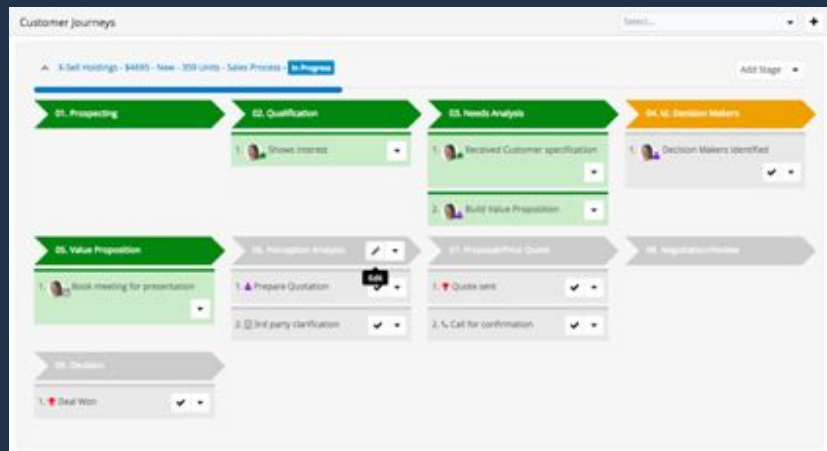
Modern Sales Force Automation

- Leverage modern BPM technology right inside the sales automation system
- Provide visual cues to the next required or optional steps in the sales process
- Give every rep the context and process flows to close more business
- User adoption

- SugarBPM is a complete business process management solution embedded right inside the Sugar platform
- Allows for fast, simple creation of process automations
- Supports sophisticated rules and provides timely alerts and notifications to users



Operationalise Sales Process



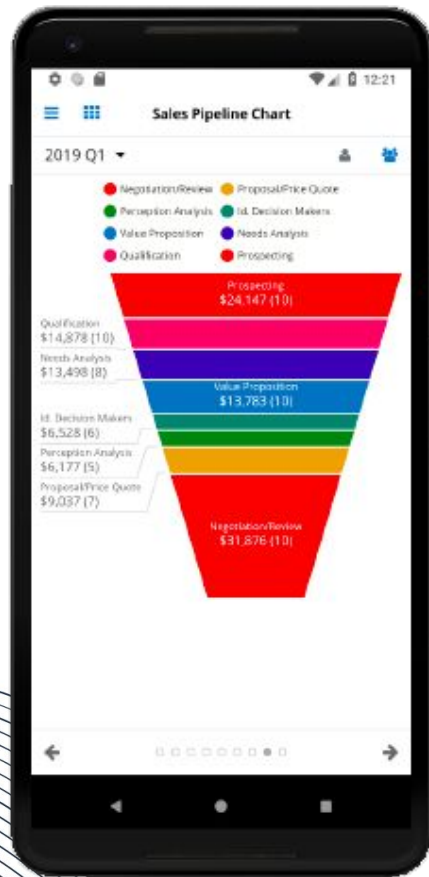
- A prescriptive sales process minimises time required to determine next steps and actions

- Apply Different Journeys by Customer Profile

- Your customers differ in their buying preferences - accommodate them to drive greater win rates

**Anytime,
Anywhere
Access**



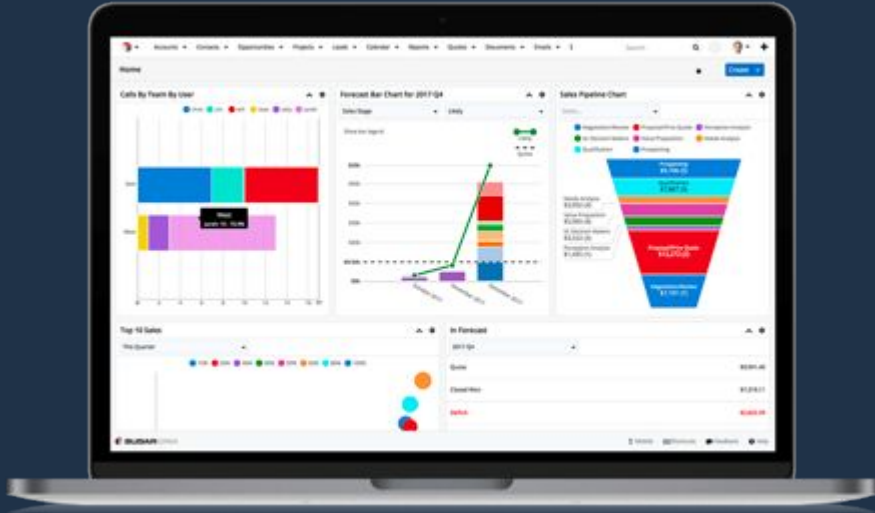


Modern mobile SFA tools provide a number of benefits:

- Ability to access and interact with critical data even when offline
- Easily generate and send sales quotes to shorten sales cycles
- Integration with onboard features (camera, geolocation, etc.) drives user effectiveness
- Custom SDKs allow for streamlined, purpose built field sales tools

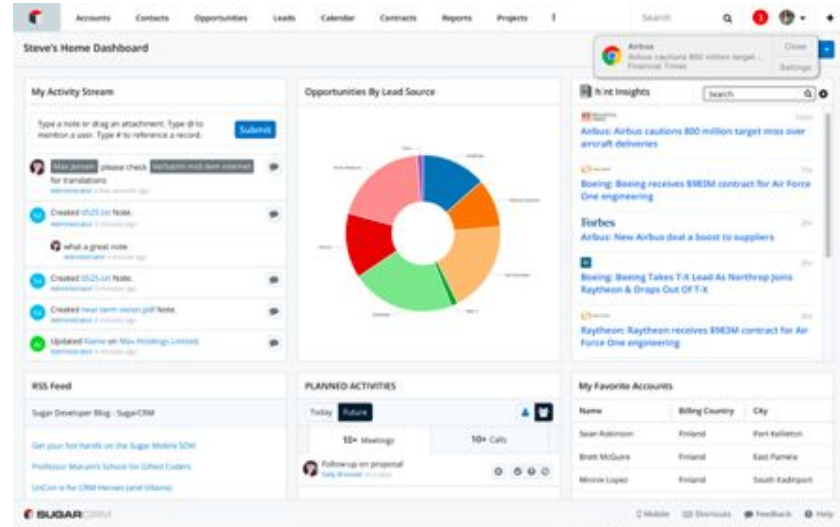
Better Leverage Data

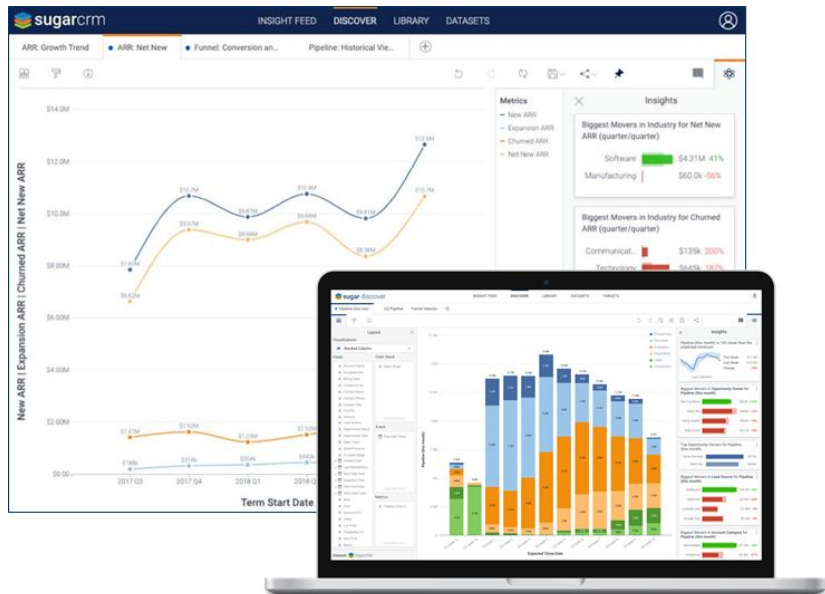




- Take advantage of hundreds of pre-built reports
- Take action from dashboards with effective drill downs
- Gain more profound insights with data visualisations
- Create multiple dashboards and build dashboards by role
- Share dashboards and reports with ease

- Hint Insights brings the wealth of knowledge around the web right into your CRM UX
- Manage multiple, complex customer relationships by staying in the know
- Proactively identify upsell opportunities, potential churn risks
- Configure notification preferences, to receive insights when it makes sense for you





Sugar Discover/Node

- Out-of-the-box Customer Analytics Pre-loaded with an extensive set of high-value metrics, analytics, and KPIs out of the box
- Continuous Automated Analysis. Tracks predefined and custom metrics in real time, alerting users when significant changes are detected
- Dynamic Insights. Augments metrics and alerts with actionable insight into the relevant factors impacting metric performance

Q&A

Contact your account manager or email Gary
sales@providentcrm.com





Thank you!