SUGARCRM

Sugar Customer Journey Solution

## Unify CRM Best Practices with the Customer Experience

Customer experience has never been more important to business success. And now there's an exciting new way to make CRM the engine that drives a better, more seamless customer experience.

Customers today say that 70% of their buying decisions are based on how they feel they're being treated. 86% of customers say they're willing to pay more for a better experience, and 65% of customers say they leave brands that fail to meet their expectations for customer service.[1] How are businesses doing in response? Remarkably, 80% of CEOs believe they deliver a superior customer experience, but only 8% of their customers agree.[2]

The Sugar Customer Journey solution enables organizations to close this gap by capturing each individual customer journey and operationalizing every step of the journey, tightly integrating it with their Sugar deployment. This coupling of the customer's perspective with internal company operations enables organizations to create extraordinary relationships — delivering more seamless, satisfying customer experiences and increasing business efficiency across the entire lifetime of their relationship with each customer.

Orchestrate Customer Experiences

With the Sugar Customer Journey solution, companies can define customer journeys that are specific to their business. These journeys can span the entirety of the customer lifecycle or focus on a particular segment of the relationship. Journeys can describe short-lived engagements or they may represent longer duration or even cyclical lifecycles. The Sugar solution includes industry-specific customer journey templates that companies can use to quickly define the journeys that are most applicable to their business.
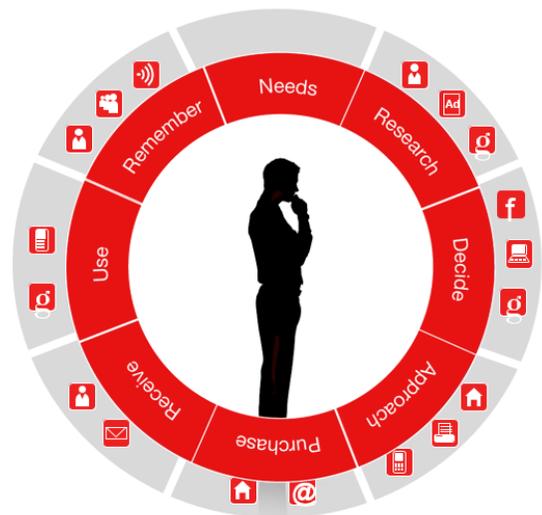
In Sugar, a customer journey can be applied to any object such as contacts, leads, accounts or even custom modules. Each customer journey is defined as a series of stages. Each stage is built from a progression of activities.
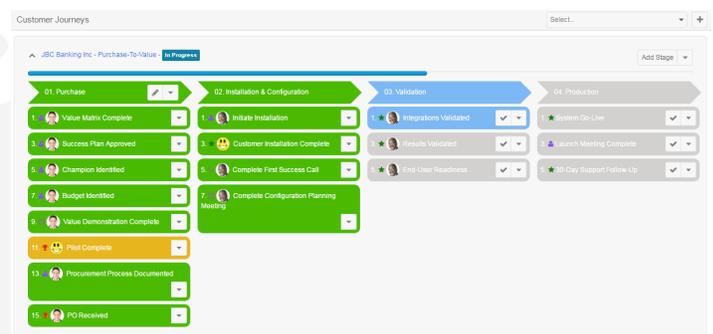
Each activity in the customer journey is modeled as a native Sugar task, call or meeting. Tying activities and business

1 Customers Report 2020
2 Bain and Company Customer-Led Growth Report

processes to a customer journey template enables companies to deliver more seamless customer experiences by showing customer-facing employees where customers are in every stage of their journey and clearly indicating their needs and expectations at any point in time.

Increase Business Efficiency

The Sugar Customer Journey solution increases efficiency by enabling businesses to more effectively focus employee actions on the needs of the customer at any point in time. Defining a customer journey map helps companies to keep the customer perspective at the forefront of their thinking. Operationalizing the map in Sugar helps make sure everyone clearly understands what needs to happen at each step along the way to advance the relationship.

Consistently following an optimized customer journey template can increase the value of leads, opportunities and accounts. Leads are more likely to convert to prospects and opportunities when journeys are tracked, and care is taken to consistently educate and nurture individuals through every step. It's also important for organizations to be able to define different business processes and treatments for different kinds of leads, since all leads are not created equal. The same principle applies to opportunities, accounts, cases and other activities as individuals work on to improving customer retention, expansion, cross-sell, upsell, and customer advocacy.

With limited resources, companies need to not only prioritize customer engagements, they also need to define the best ways to engage with different customers. The Sugar Customer Journey solution enables organizations to define roadmaps to success and measure progress at every step of the way.

With the Sugar Customer Journey solution, everyone understands where the customer is and what are the next best steps at every stage of the journey. Defining optimal customer journeys and using Sugar to operationalize them helps turn sales success and customer satisfaction into repeatable processes.
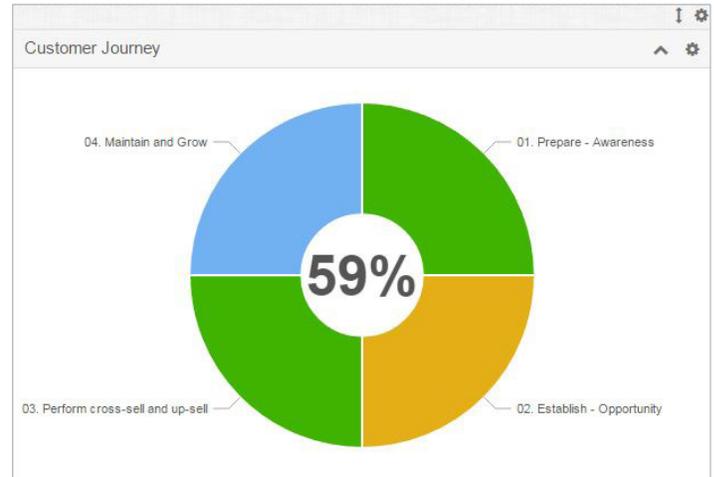
By tying the customer journey to Sugar's Advanced Workflow, Sugar users can automate the execution of activities in each customer's journey. Each action taken can automatically trigger subsequent activities, assigning these activities to the right individuals. This makes Sugar a powerful engine to guide customers and coordinate employees through the entire customer journey.

Start Your Journey Today

Why not make your ideal customer journey every customer's journey?

Contact your SugarCRM Sales Representative, Reseller Partner, or visit www.sugarcrm.com to learn more about how the Sugar Customer Journey Solution can benefit your business today.