



SugarCRM Reporting

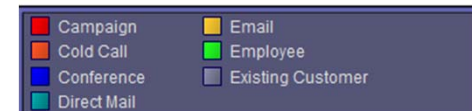
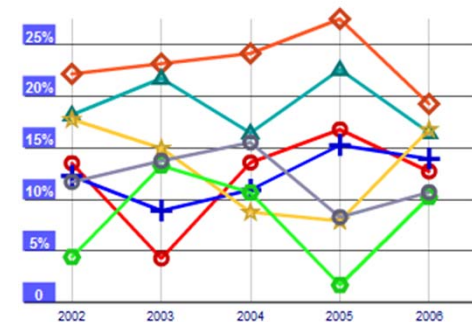
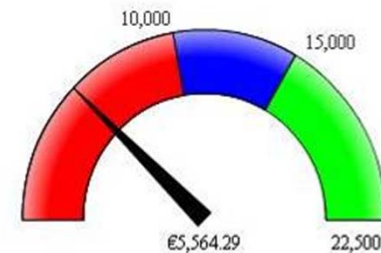
June 6, 2011



Provide Better Visibility Across the Business



- Create real-time reports and dashboards on any CRM metric
- Monitor the effectiveness of marketing programs, sales opportunities, and support cases
- Share/restrict access to reports and dashboards across teams



SugarCRM Reporting



Issues



Lack of understanding on how marketing impacts sales

Poor visibility into business performance

No understanding of why customers are defecting

Solution



- Track results of marketing leads to closed-won deals
- Measure ROI programs of programs across channel

- Dashboards identify win/loss rates, competitive deals and lead source
- Review and revise rep and team forecasts

- Customer reports on service requests, bugs, case resolution and response times

Impact

Understand how leads are generated and which marketing programs work

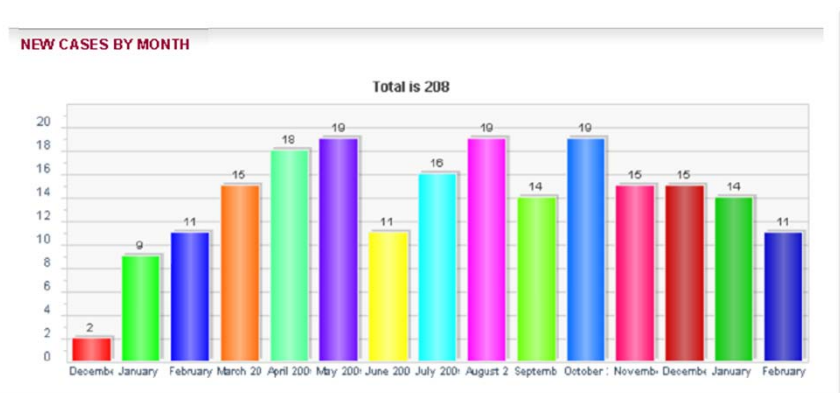
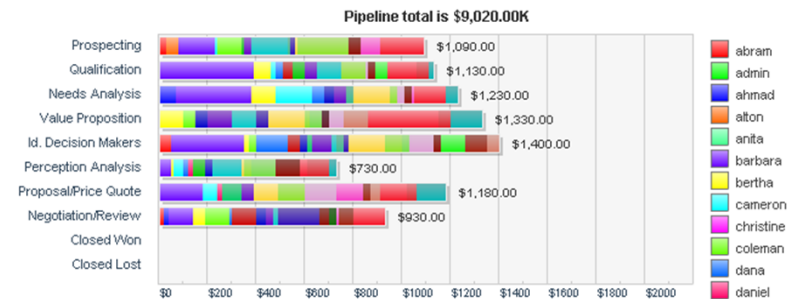
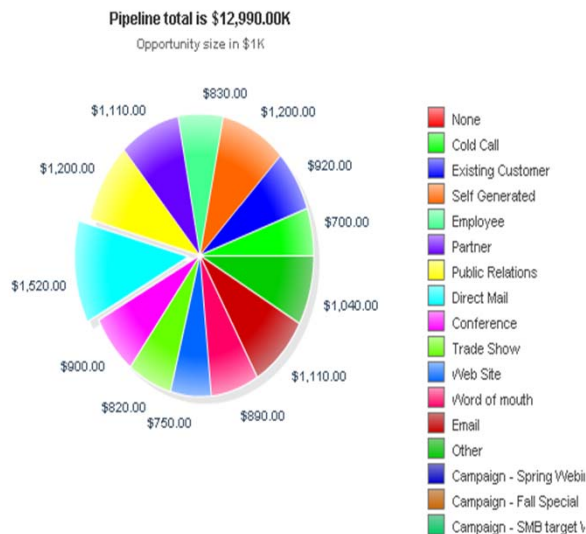
Gain the insight needed to drive the business

Identify small customer problems before they become large ones

Dashboards

- Users can create any number of custom dashboards based on any variable within Sugar
- Dashboards display real-time information
- Charts can be shared across individuals, teams, or the entire company

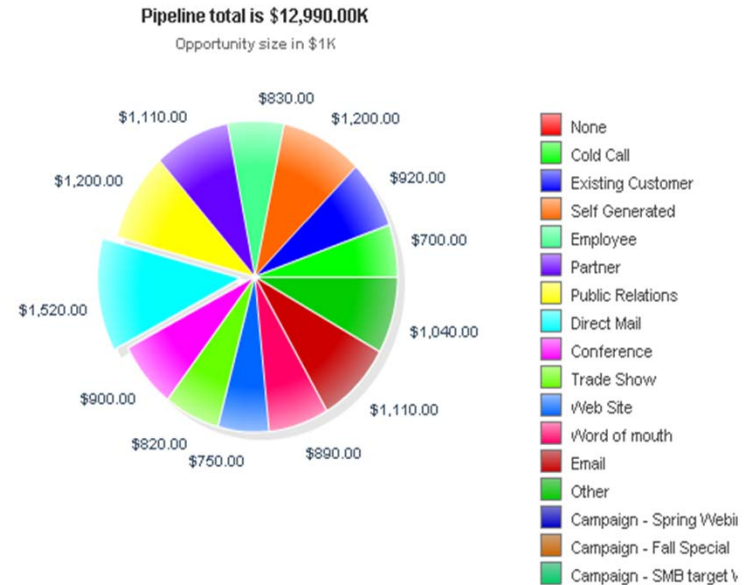
ALL OPPORTUNITIES BY LEAD SOURCE



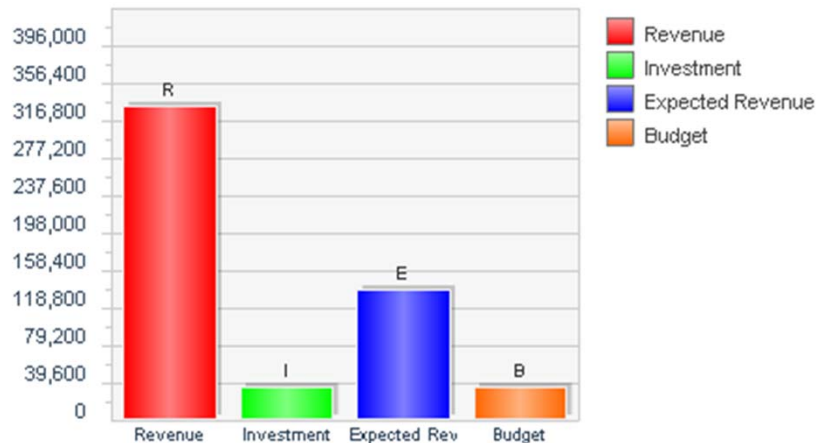
Marketing Analytics

- Understand the ROI of marketing programs
- Track which channel is most/least profitable
- Replicate successful campaigns in a few simple steps

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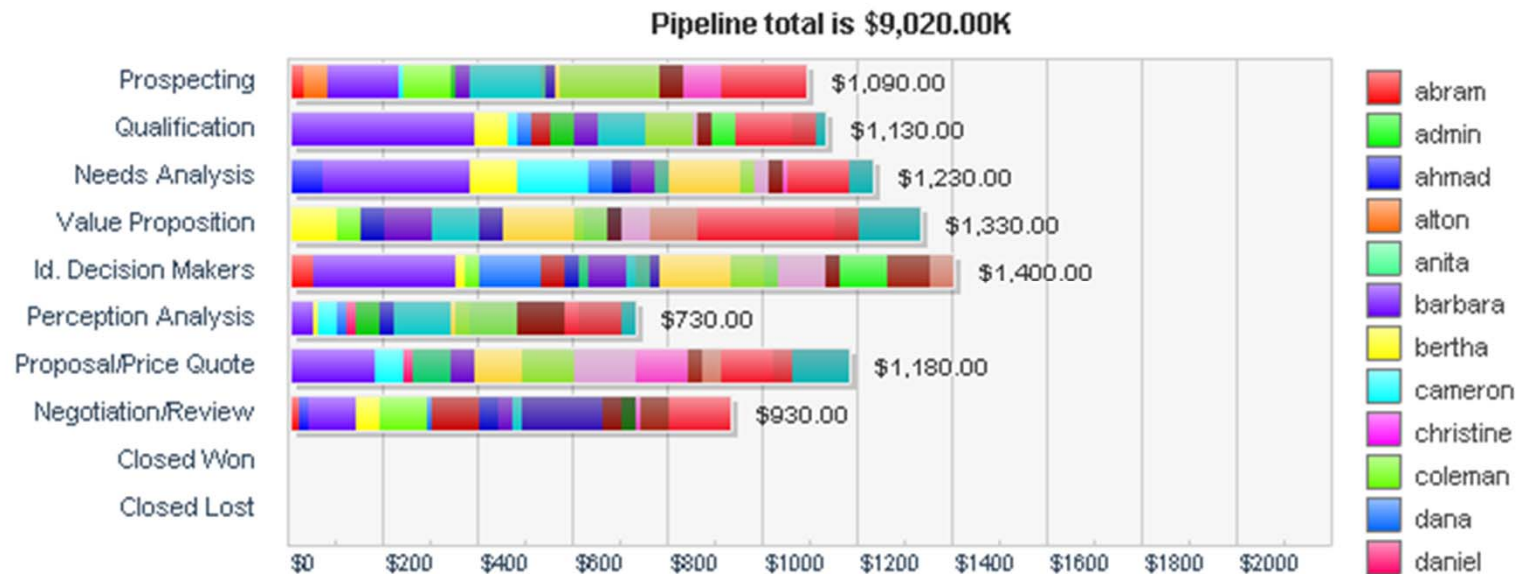


Campaign Return On Investment



Sales Trend Analysis

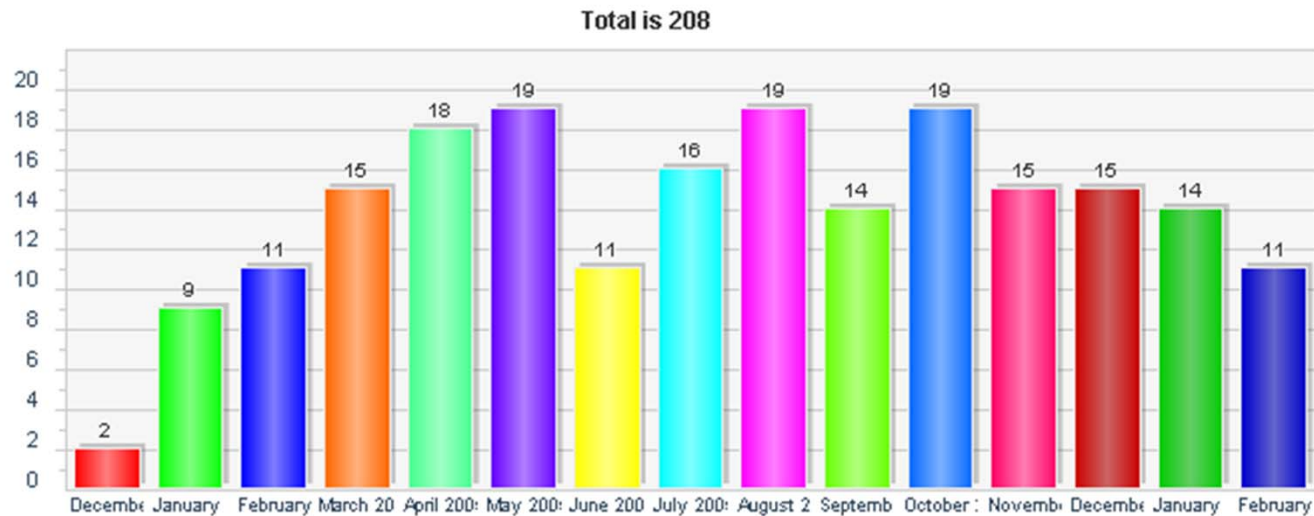
- Present user-specific information about opportunities
- Consolidate sales data for executives
- Customize charts and reports based on key metrics
- Drill down on charts to understand performance



Case Reporting

- Monitor the effectiveness of case responses
- Identify and prioritize customer problems
- Measure how issues are resolved across individuals and teams

NEW CASES BY MONTH



Customer Profiles

- Understand your customer base
- Parse by industry, revenue, time, geography, and other attributes
- Deliver relevant reports based on concrete data

