

SugarCRM for Law Firms A Whitepaper



conscious

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1 Why SugarCRM

One of the historic barriers to law firms adopting firm-wide CRM implementations has been the cost the CRM software itself.

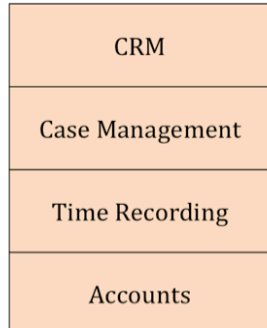
Not only that, but most partnerships recognise that they have an enormous amount of work to do changing the culture and the processes of the firm to adopt “full on” CRM in the way that other more sales & marketing led businesses have always done it.

Utilising commercial Open Source software (i.e. software free of any license fees) is the ideal way for a law firm to move forward with CRM allowing them to spend their budget where it will make the most difference – the people and processes!

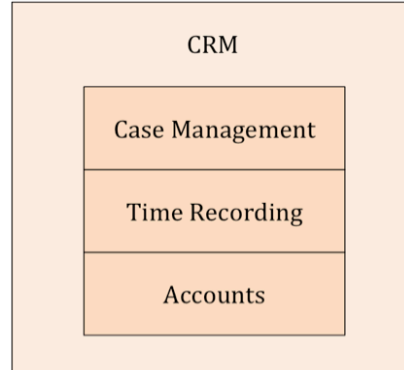
Most law firms already have a mish-mash of software platforms “running” their business. This might be legal accounts & time recording, practice management and case management. Often these applications may well come from different suppliers with little or difficult to do, integration options.

Most law firms see CRM as a functional piece of software like the diagram shown on the left below. Contacts etc get stored in CRM and may filter down to the other applications.

How must people see CRM in their overall systems



How we prefer people to see CRM in their overall systems



We like to think of CRM as more of a “wrapper” around the other applications, integrating with those systems as and when required. The diagram on the right shows where we think CRM fits into your other systems.

SugarCRM is one of the world's leading providers of open source CRM software for small, medium and large companies. SugarCRM offers a flexible, cost-effective alternative to proprietary applications. SugarCRM is used by over 3,500 commercial organisations worldwide. Many of these clients run the free, open source version of SugarCRM whilst they drive the wide-spread adoption of CRM software, culture and processes throughout their business.

SugarCRM's open source architecture allows us to rapidly customise and integrate customer-facing best practices and your proprietary business processes. If required, SugarCRM can be deployed on SugarCRM's own on-demand platform, or we can source a suitable UK based

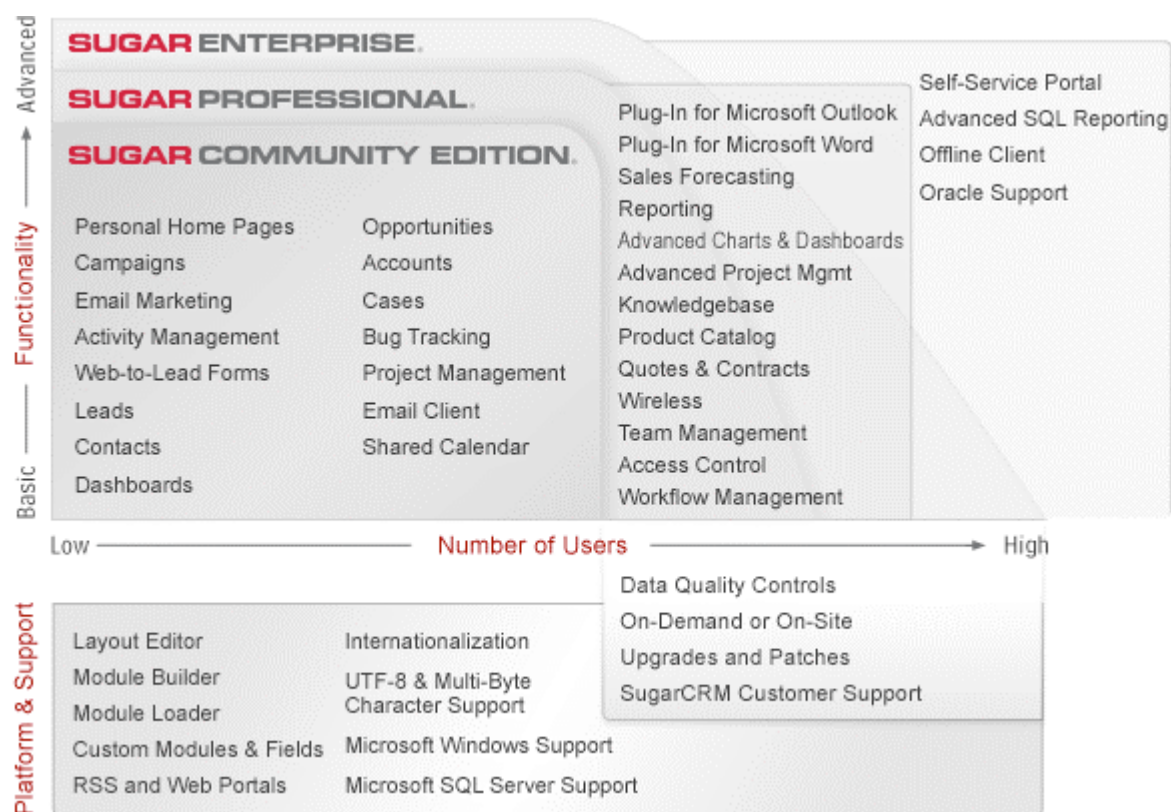
hosting company for you. The vast majority of the time law firms prefer to host within their own fully secure internal data centre. You are not locked into either deployment option. You can move from one environment to the other seamlessly, offering greater flexibility as your business matures, your need to integrate grows, or outsourcing IT services becomes a more viable option.

SugarCRM is helping people to rethink how technology can help companies manage customer relationships. Sugar, the market leading commercial open source CRM application, delivers a feature-rich set of business processes that enhance marketing effectiveness, drive sales performance, improve customer satisfaction and provide executive insight into business performance. Supported by deep collaboration and administration capabilities that adapt to how your company operates. SugarCRM comes in three editions.

1.1 SugarCRM Editions

- **Sugar Community Edition** - Open Source version, free of license fees
- **Sugar Professional** - a commercial version offering more advanced features
- **Sugar Enterprise** - the enterprise edition with offline capabilities & Oracle support

The following diagram highlights the different functionality each version offers.



As a pioneer in the commercial open source application space, SugarCRM has a dual license approach to commercialising their software. In order to acquire advanced features, organisations must invest in one of two Commercial Editions. We have found customers easily understand and are willing to pay for the commercial products if the business requirements are such that commercial features are needed. Until that time, most firms can use the free Community Edition for the vast majority of their CRM needs.

1.2 Sugar Community Edition (CE) Features

There are some key modules to the Sugar CE version that allow the firm to implement a feature rich CRM solution at an affordable cost.

- **Personal Home Pages** - allows a custom home page to be created for each user showing the most relevant information to them e.g. Managing Partner sees all opportunities for all fee earners, whereas a fee earner sees a list of their key contacts.
- **Campaigns** - centralises the development, execution and monitoring of campaigns across multiple channels. With Sugar campaign management, companies achieve better visibility into the effectiveness of marketing spend.
- **Activity Management** - can be used to streamline the tasks necessary to get the job done. Manage e-mails, meetings, calendars and calls within a central location to ensure teams work together to close more opportunities in a shorter period of time. Integration with Outlook can be achieved using a simple, inexpensive add-on.
- **Leads** - allows you to track leads across the whole firm. No more islands of information in individual fee earners separate copies of Outlook. Increase visibility of high value prospects by knowing who else in the firm is talking to contacts at the same business.
- **Contacts** - consolidates contacts into a single location and associates accounts with sales opportunities, account information and customer case information. Proven import and de-duplication technology ensures that companies have a clean, consistent view of prospects and relationships.
- **Accounts** - capabilities provide a single view of customers across products, geographies, account, and status. In one single page, users see not only account information, but all associated sales opportunities, contacts, activities, history, cases and quotes. Account management gives your organization the ability to build tighter, more profitable relationships by understanding the status of each account.
- **Opportunity Management** - allows your departments to close deals faster by sharing consistent sales & pipeline information, tracking deal progress, and recording deal-related interactions. Customize Sugar to fit how your opportunity management process works, including sales methodologies, account details, and opportunity handling.
- **Dashboards** - provide Partners, Fee Earners and Support Staff real-time information about leads, opportunities and accounts. You can define access based on user profile and expose the information employees need to know to get their job done. Automatic consolidation of sales data from across teams reveals the information Partners need to drive performance across the firm.
- **Project Management** - a simple project management application that allows projects and task lists to be managed across a team.

1.3 Sugar Community Edition (CE) Platform

The Sugar CE platform capabilities allow administrators and developers to create powerful business processes and custom fields etc, quickly and easily.

- **Layout Editor** - provides administrators with the ability to tailor the look of each Sugar screen by editing and renaming tabs, changing dropdown values, and choosing to hide unused modules. With the Sugar Layout editors, administrators can tailor the application to meet the specific use cases of the company, while hiding unneeded modules.
- **Module Builder** - enables users to build custom modules from scratch or combine existing or custom objects into a brand new CRM module. Developers can leverage existing Sugar Objects such as Contacts, Accounts, Documents, Cases and Opportunities to build a new module or create their own custom objects from scratch to form a new module. Users can build an unlimited number of custom modules, which interoperate seamlessly with Reporting, Workflow and Sugar Studio tools. Upgrades

for custom modules are fully supported.

- **Custom Field Editor** - allow a firm to capture information specific to their business within Sugar. By creating Custom Fields using Sugar Studio, administrators create fully upgradeable values that reflect information most important to the company. Administrators can also choose to require users to populate custom fields before a record is saved i.e. make the field mandatory.

1.4 Recommended Addons to Consider

There are some additional open source tools that we recommend adding on to Sugar CE to allow powerful reporting and integration opportunities.

- **iReports / JasperReports** - JasperReports enables report imaginable. Reports are built from a number of independently defined and formatted sections: Title, Page Header, Column Header, Group Header, Detail, Group Footer, Column Footer, Page can contain any number of nested groups. On each group break, JasperReports inserts a Group Footer and the Group Header for the next group automatically, enabling multiple levels of sub-totals. iReports is the GUI interface that lets you design the reports you need.



You may already be using something like Crystal Reports for other business reporting and can happily continue using that application or any other SQL based reporting or business intelligence tool. Price from FREE.

- **ZuckerReports** - ZuckerReports is the most powerful runtime and design environment for your custom reports integrated into Sugar. It includes JasperReports, list designer, custom SQL, Word, Excel and OpenOffice integration. Reports designed in JasperReports are uploaded to SugarCRM and are then executed on a run-time or scheduled basis using ZuckerReports. Price is FREE.
- **Grinmark MS Office Addon** - a paid for addon that allows the archiving (uploading to SugarCRM) of emails from MS Outlook. Also allows the creation of Contacts/Accounts plus complete Outlook contact synchronization should that be required. Prices from FREE.
- **Riva** - Riva Integration Server from Omni is an advanced CRM data integration platform for Microsoft Exchange, Novell GroupWise and Apple Mail. Unlike standard Outlook CRM plug-ins for synchronizing data, Riva gets installed only once on a server. Prices from 150 Euros/User.
- **Fuanmbol** - Funambol Community Edition is free open source software that enables you to synchronize data between mobile devices and backend data sources, and to perform push email. It includes built-in functionality to perform mobile cloud sync. The software can also be used to build and deploy mobile data applications and services. Price is FREE.



1.5 Why Conscious Solutions

SugarCRM is the foundation of our business. We run all our sales, marketing & CRM programs using it, as well as all our task tracking, case management and time recording.

We are "open source" advocates and have been using open source technologies for more than 12 years as the basis for our website services. We are skilled at getting the best out of "free" applications.

As specialists in the legal market, running over 200 websites for law firms, we believe we are ideally placed to provide continual innovation for firms using SugarCRM.

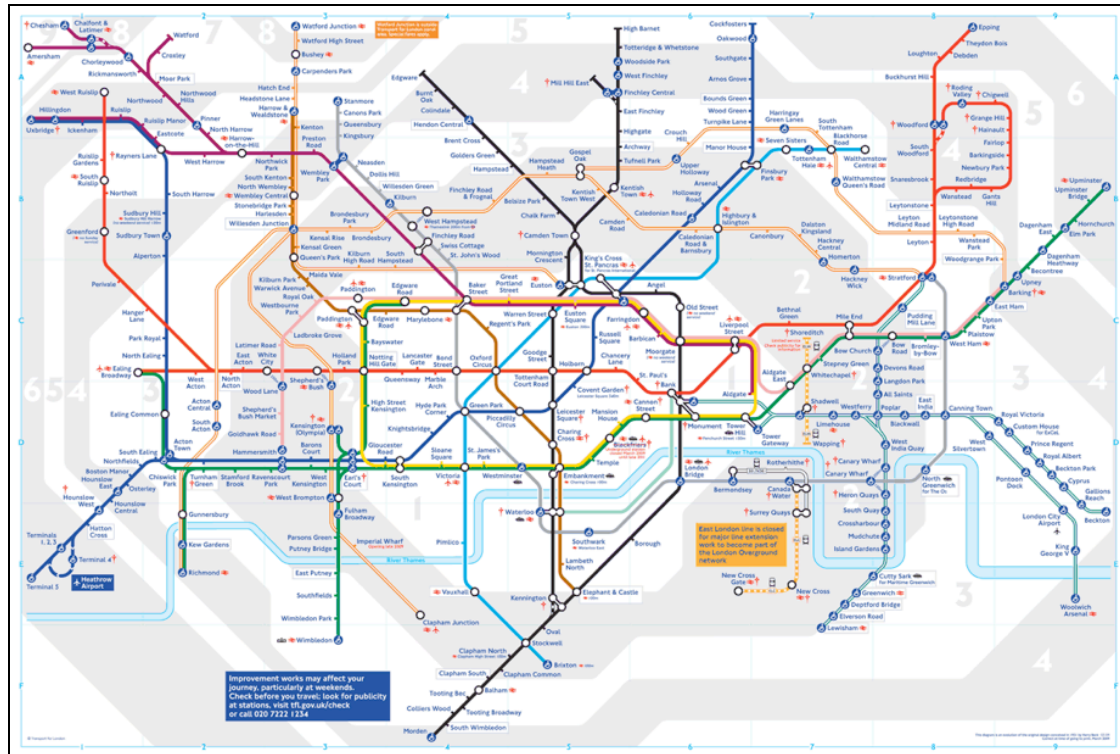
With a large client base with are ideally placed to “group” clients together and thus share project costs for some of the integration projects that embedding CRM into your business may well entail.

We already one law firm client live with a pilot SugarCRM system which they have already integrated into their Practice Management System and are synchronising 35,000 records.

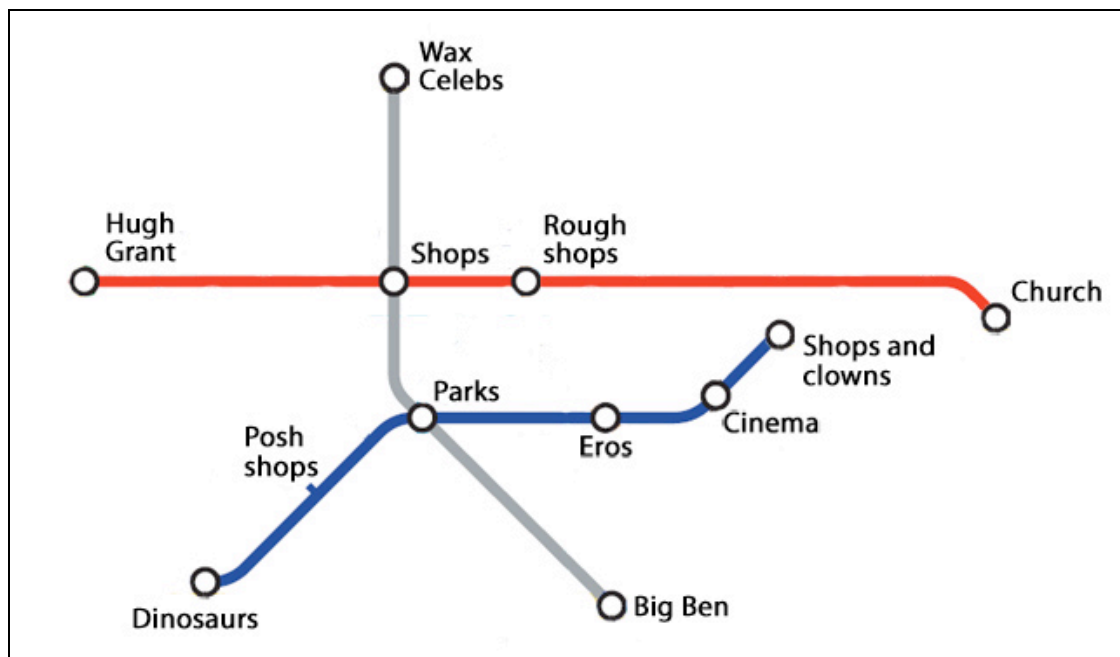
2 The KISS Approach

We've all heard the horror stories of CRM projects that never delivered what they were promised. The key here is to "keep it simple.....".

The following two diagrams explain just this concept. The first represents a CRM project which is going to do EVERYTHING, it's going to transform the firm. This is all well and good as an end goal, but.....



This second diagram explains what the firm SHOULD start with. Get started with something simple. Get a "bridgehead" of users within the firm, often one or more of the commercial teams. Get people using the CRM system and talking about it, then roll it out more widely and integrate with other applications as necessary.



3 Training & Support

The following are the training and ongoing support options that we can offer. All elements of the project will include elements of training, but subsequent to our meeting to review the initial proposal we have still included one and a half days of general "admin training" on all aspects of SugarCRM.

3.1 Installation

A full installation service including configuring backups etc in line with your existing backup policies.

3.2 Onsite Training - Administration

This training ensures that your IT staff understand the basics of the SugarCRM configuration as well as making sure your marketing team know who to perform simple customisations of the SugarCRM environment.

System Configuration

- **Configure System Settings** - This section will enable you to configure Sugar settings such as User Interface, Logos, Proxy Settings, Customer Self-Service Portal, SkypeOut, Mail Merge, Default Currency, Export and Advanced.
- **Manage Users** - This section will enable you to understand user types, access User Management, create users, manage user information and edit or delete multiple items from a list.
- **Manage Roles** - This section will enable you to define role characteristics, access roles, create roles, set role privileges and create duplicate roles.
- **Manage Teams** - This section will enable you to understand team characteristics, access teams, create teams, assign users to teams, manage team information, understand team membership and create and manage team notices.
- **Configure Email Settings** - This section will enable you to access and set Sugar outbound email settings such as email notification options, user email defaults and outbound email options.
- **Configure Inbound Email** - This section will enable you to access and set Sugar monitored inbound email settings such as basic setup, email handling options and configuring monitored mailboxes.
- **Manage Schedulers** - This section will enable you create and configure Sugar schedulers, understand the default schedulers and configure advanced options.

System Administration

- **Access Developer Tools and Studio** - This section will enable you to access the Developer Tools and Studio.
- **Navigate Studio Components, Help and Assistant** - This section will enable you to navigate to Studio components and use Studio Help and Studio Assistant.
- **Navigate Studio** - This section will enable you to access and navigate within Studio.
- **Edit Layouts** - To enable you to make basic customizations to module layouts.
- **Create and Manage Fields** - To enable you to create, edit and delete fields.
- **Create and Manage Drop-down Lists** - This section will enable you to use the Dropdown Editor to create custom drop-down lists and edit custom and standard drop-

down lists.

- **Edit Labels** - This section will enable you to edit labels for a module.
- **Rename and Configure Module Tabs** - This section will enable you to rename module tabs, configure the tab display and order and configure group tabs.

3.3 Onsite Training - End Users

We can provide End User training at your premises if required, covering topics such as :-

- **Create and Manage Leads** - Learn how to create, manage, and track leads, or unqualified opportunities, and view all related activities, history and campaigns.
- **Convert Leads** - Learn how to convert a lead to a contact, account, and opportunity.
- **Create and Manage Opportunities** - Learn how to create and manage sales opportunities, or qualified leads, and view all related records.

Many clients once they start to use SugarCRM are happy to provide this End User training themselves by their core team to help keep project costs down.

3.4 Support

We already provide remote support for all our clients using a variety of techniques :-

- **Phone Support** - available 9am - 5pm Mon - Fri.
- **Email Support** - email support provided by support@conscious.co.uk which logs a support Case with us (using SugarCRM!) which allows us to handle requests for support via email.
- **Remote Support** - using a software product called Glance we are able to connect remotely to client's servers and provide hands-on support as required.