



# Leveraging Intelligence to Maximize the Value of CRM Data

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## Leveraging Intelligence to Maximize the Value of CRM Data

Increasing efficiency, productivity, and relevancy within sales and support interactions is critical to meeting the demand for more personalized, relevant, and timely customer engagements. The days of one-size-fits-all marketing and engagement are long gone, and organizations need to deploy cutting-edge technology that enables them to maximize the customer, product, and service data they hold within their customer relationship management (CRM) system while minimizing the additional effort and expense that accompanies a traditional 1:1 engagement strategy.

SugarCRM leverages artificial intelligence (AI) technologies to maximize the value of data held within the CRM. By choosing embedded AI technology, businesses can minimize implementation issues and speed up time to value while reducing the risks associated with trying to architect, develop, deploy, and manage bespoke technology projects.

## Driving Improvements to Efficiency, Effectiveness, and ROI Through Intelligence

Sugar's platform is designed to drive greater efficiency and improve the impact of data by allowing users to surface and activate insights without the need for significant user experience with AI or development tasks. The market for AI is expected to balloon over the coming years. Futurum Intelligence forecasts that the global annual spending on AI software will reach \$164 billion annually by 2027, up from \$115 billion in 2023. However, the use cases that generate the most investment generally have access to granular, segmented data, can quickly generate a return on investment (ROI), and extend value across the entire organization.

Sugar delivers a range of intelligence features to boost efficiency and effectiveness. Often referred to as "classic" or "traditional" AI, Sugar's platform incorporates predictive AI, which is designed to anticipate customer needs and behavior patterns to prioritize leads, predict churn risk, and forecast sales opportunities. This type of AI uses machine learning techniques to analyze data held within the CRM to identify patterns that can lead to insights and action recommendations based on each use case.

The platform also incorporates sentiment AI, designed to analyze interactions captured within emails, social media conversations, and support tickets to gain insights into customer sentiment, which can encompass a wide range of feelings, from happy and satisfied to angry and frustrated, as well as others along a continuum. In the past, customer representatives or digital chatbots would only be able to rely on the words a customer was saying without incorporating the actual sentiment being experienced by the customer, which is often a more accurate predictor of future behaviors, such as the likelihood to churn or increasing purchasing frequency. Sentiment analysis allows organizations to identify dissatisfied customers and address their concerns promptly.

Perhaps most prominently, Sugar is incorporating generative AI into its platform, which enables a wide range of functionality and benefits. Within the SugarCRM platform, generative AI is being embedded to enable users to automate repetitive tasks, generate personalized content, and create intelligent summaries of customer data, thereby reducing manual effort, increasing precision and responsiveness, and driving better customer experiences.



## Providing Value Across the Spectrum of Intelligence Features

Sugar's intelligence features encompass the entire spectrum of data analysis techniques, providing valuable insights at every stage of the customer journey or engagement cycle. These features reflect the underlying processes used to analyze and interpret data so it can be activated across customer engagement touchpoints.



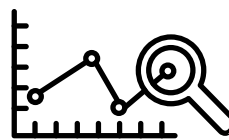
### Descriptive:

Summarizes key customer data points to clearly understand the customer base while incorporating the relevant context.



### Diagnostic:

Analyzes customer data to identify root causes of issues and opportunities for improvement.



### Predictive:

Forecasts future trends and customer behavior to make data-driven decisions.



### Prescriptive:

Provides recommendations on the best course of action based on your CRM data.



## Delivering Safe, Responsible, and Powerful Generative AI-Powered Intelligence Capabilities

While AI has already demonstrated significant benefits to customers, significant concerns have rightly been raised around the safe and responsible use of the data used to train models, the security and privacy of private or sensitive customer or company data, and the implementation of guardrails and auditing tools to ensure fair, safe, and responsible use of AI. As AI is increasingly used in decision-making processes, customers are concerned about transparency and accountability.

Sugar's Generative AI Delivery Framework is designed to ensure the safe and responsible use of AI, through the implementation of several features and controls. The platform grounds the generative AI model in factual data held only within Sugar to ensure accuracy and limit bias or hallucination. Then, a masking layer is deployed to protect sensitive information within the data used by the AI models, such as personally identifiable information (PII), ensuring that the LLM layer (in which the generative AI model is deployed) is never able to see or ingest this private data.

Next, a Moderation Layer is used to review the generated output, and then a filter is applied to ensure that the output meets quality and safety standards. Finally, an Audit Layer tracks and logs the generation process to ensure transparency and accountability, which is critical to establishing confidence among users and their customers.

## Key Benefits of a Layered Approach to Generative AI

Incorporating AI within the framework of an enterprise-grade CRM is far different than simply typing in a prompt within a public generative AI-based chatbot. In a corporate environment, a layered approach to generative AI safeguards sensitive data and ensures compliance with data privacy regulations.

This approach enables a framework for deploying guardrails against misuse and model hallucination by ensuring that inputs and outputs are checked and moderated before being utilized in any process or decision-making. The layered approach also supports integrating new AI models, capabilities, and use cases as they become available.

# Providing Value through Intelligent Summarization

A core functionality offered via the SugarCRM platform today is intelligent summarization. Powered by generative AI, intelligent summarization capabilities are designed to drive more user efficiency and accuracy by summarizing opportunity and case data held within the CRM, which is often difficult for humans to quickly assess and digest, particularly when more data is being frequently added or modified.

SugarCRM's intelligent summarization capabilities offer several advantages to organizations. The tool supports multiple languages, enabling better team collaboration and communication with international customers.

The intelligent summarization capabilities can synthesize and analyze complex details, providing concise summaries of data held within the platform for quicker identification of essential and relevant information, which can provide information. This enables users to quickly understand the entire scope of an opportunity or case, with the appropriate contextual details incorporated into the summary, eliminating the need to manually synthesize individual pieces of information from multiple fields.

Additionally, descriptive, diagnostic, predictive, and prescriptive analytics are incorporated within the intelligent summarization function to generate comprehensive summaries. These summaries can uncover hidden insights to help users extract valuable insights from data faster, leading to improved decision-making and ROI.

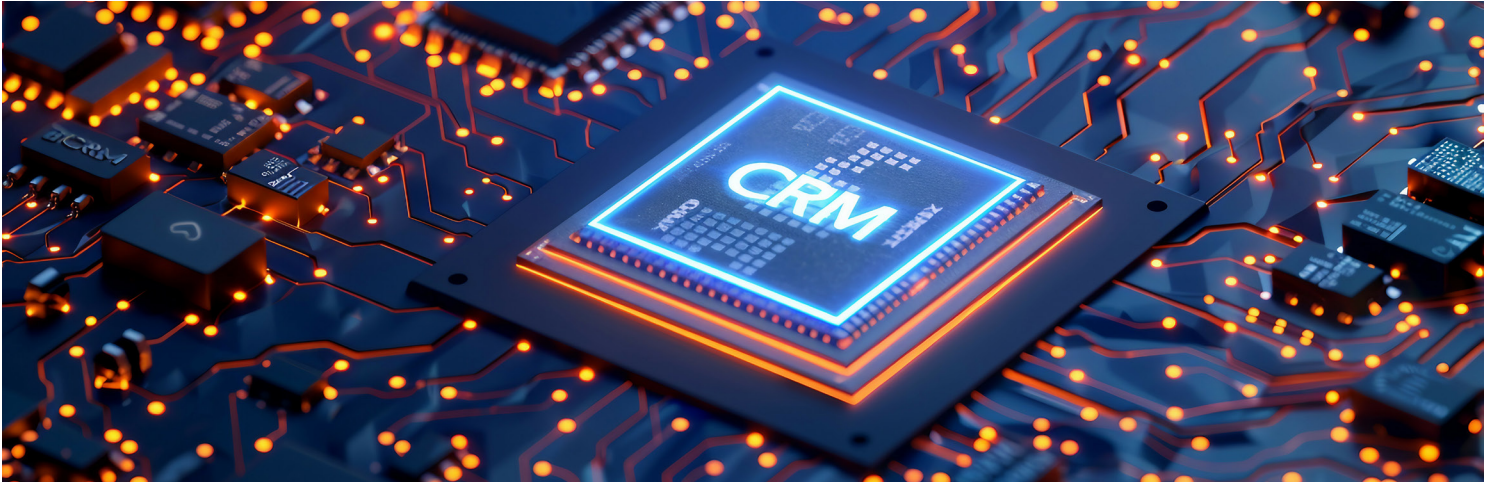
## Key Use Cases

Two use cases leverage Sugar's intelligent summarization capabilities – Opportunity Summarization and Case Summarization – and future use cases are coming. Within these scenarios, AI is designed not to replace humans but to help them absorb data and insights more efficiently and let them focus on taking actions that can deliver business results.

For example, Opportunity Summarization is designed to generate summaries of sales opportunities that highlight crucial details, strengths, weaknesses, and potential roadblocks that may impact a deal. These details and insights are derived from the AI model reviewing and incorporating relevant data held within the CRM, enabling stakeholders—from other salespeople to management—to quickly understand the status of the opportunities and take the necessary actions to push the deal to completion without needing to read through a timeline of events.

Similarly, Case Summarization is designed to create concise summaries of customer support cases, allowing agents to focus on resolving issues more efficiently. Previous interactions and records detailing any steps already taken to address the issue are summarized to help customer support agents efficiently address each case. Managers can also quickly review in-progress cases to get a holistic view of the company's current support landscape.

Soon, Sugar's platform will be able to generate intelligent summaries of account data, providing a 360-degree view of each customer and incorporating past and current interactions with marketing, sales, and support teams. This allows all stakeholders to understand each account, enabling more strategic planning based on data.



## SugarCRM's Model for Delivering Generative AI Benefits to the Mid-Market

AI is often seen as a leveling force in the market, enabling small- to mid-size organizations to more effectively compete against large organizations due to the efficiency and productivity gains, along with access to deeper insights provided by the technology. Although developing and deploying generative AI from scratch can be extremely expensive, SugarCRM makes generative AI benefits accessible to mid-market businesses through several structural and product-led initiatives.

Sugar's approach of providing access to generative AI through a software-as-a-service (SaaS)-based model ensures that mid-market companies can leverage a complete suite of CRM features with embedded AI capabilities. The company offers competitive license pricing to allow organizations to make these features and benefits available to all users who require them within an organization.

Moreover, each of these offerings incorporates a reasonable number of tokens for generative AI calls, ensuring that organizations can test AI's functionality within their ordinary course of work. Sugar provides flexible options for managing additional generative AI usage, including paying for additional tokens on an as-needed basis or pre-paying for additional token bundles upfront at a discounted rate.

## Empowering Sales and Service Teams via Responsible AI

Leveraging AI within a CRM platform such as Sugar empowers sales and support teams to extract valuable insights from customer data, reducing effort and improving accuracy. Sugar's embedded approach to generative AI minimizes the security risks and costs of building AI functionality using in-house teams or third-party consultants.

Most importantly, deploying AI within a CRM platform will deliver ROI across sales and support functions without the added exposure to risk that can arise when deploying public-facing generative AI use cases. By successfully deploying AI within internal-facing use cases, organizations will be even better prepared to deploy the technology in customer-facing scenarios in the future.

# Important Information About this Report

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## ABOUT SUGARCRM

SugarCRM offers software solutions that helps marketing, sales, and service teams reach peak efficiency through better automation, data, and intelligence so they can achieve a real-time, reliable view of each customer. Sugar's platform provides leading technology in the sales automation, marketing automation, and customer service fields with one goal in mind: to make the hard things easier. Thousands of companies in over 120 countries rely on Sugar by letting the platform do the work. Headquartered in the San Francisco Bay Area, Sugar is backed by Accel-KKR.

For more information about SugarCRM, visit [www.sugarcrm.com](http://www.sugarcrm.com).



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