SugarPredict | Customer FAQ

General Questions

What is SugarPredict?

The SugarPredict AI engine is an integral component of the SugarCRM high-definition customer experience CX platform. It will help drive business predictability and performance by continually analyzing your customer data, comparing it to a store of secure data sources, providing AI-driven predictions specific to your business. The SugarPredict results are presented to Sugar users via the Sugar Sell and Sugar Market user interfaces. Insights are presented clearly, offering your sales, marketing, and customer service teams the next-best-action.
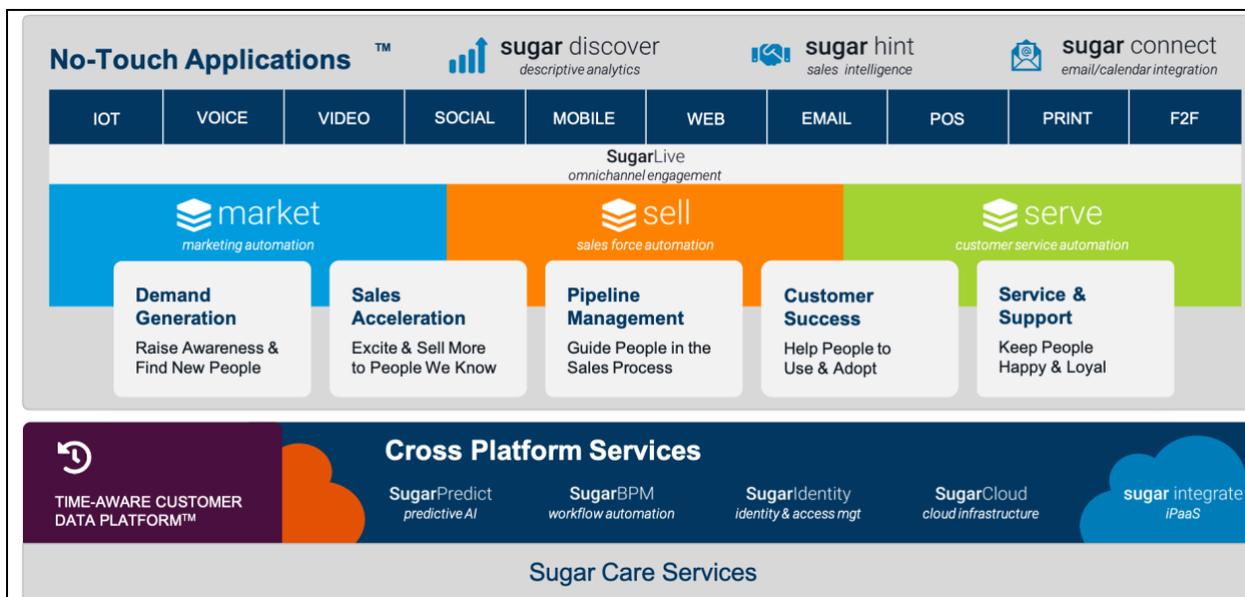
What are the SugarPredict models?

SugarPredict takes the guesswork out of:

- Lead interest scoring and prioritization
- Lead conversion predictions
- Ideal Customer Profile (ICP) alignment
- Open Opportunities assessment

When is SugarPredict available?

SugarPredict is available in Sell today and in Market on May 18th, 2021.

What AI models are available today or in the near future?

Sugar Market

Lead Interest Prediction
- Analyze data in Market & across Market customers (metrics and high-level stats)
- Time-aware activities performed
- Compared to Opportunities created

Lead Fit Prediction – Coming Soon
- Compared to current customers
- Look for signatures like verticals and engagement metrics
- Market data analyzed in detail

Lead Conversion Prediction – Coming Soon
- How likely is the associated account convert to an Opportunity
- Support better forecasting
- Opportunity & Leads/Contacts analyzed

Sugar Sell

Lead Conversion Likelihood
- How likely is a lead to convert to a qualified lead
- Based on similarity to historic leads that have converted
- Focuses on lead interest

Lead Fit Similarity (ICP)
- Shows lead similarity to an Ideal Customer Profile (ICP)
- ICP can be determined via different means: lifetime customer value, low churn, good product fit, low support costs

Opportunity Won Likelihood
- How likely is an opportunity to convert to a sale
- Based on customer data as well as opportunity events (contact interactions)
- Will support better forecasting in future releases

Which users will benefit the most?
From our early discussions with our customers, we believe business development reps, salespeople, sales operations, sales managers and marketers will all benefit from the results and analysis delivered. They will quickly realize their hottest leads and how they match their ICP, and which opportunities are more likely to close. In the case of Market a marketer will be able to create lists based on SugarPredicts' analysis and create specific nurture streams based on a leads score prediction.

For Market lead score prediction to work do I need to sync opportunities with my CRM or use opportunities?
Yes. That is a requirement, as well as approximately 100 leads or more history so SugarPredict has enough data to fuel its prediction model.

For Sell what CRM data do I need in place to benefit from SugarPredict?
Our analysis shows that the AI models require approximately a minimum of 200 leads and 200 opportunities that have flowed through the pipeline for SugarPredict to analyze what it needs to deliver meaningful results. But this is just a guideline, and we have

Customer Service Managers and a service engagement team ready to help with this type of AI assessment.

What will SugarPredict cost?
The AI models for Sell and Market add significant time saving and productivity value from day one for our customers, and they are complimentary for Sell and Market customers.

Will SugarPredict be launched and available across the globe?
Yes. For those customers interested in benefitting from SugarPredict, we recommend reviewing our SugarU AI activation content and please feel free to contact your Customer Service Manager. Both Europe and Asia-Pac customers will be able to benefit from SugarPredict in the 2nd half of 2021 as we add SugarPredict to those hosting regions.

Will SugarPredict also analyze Enterprise and Professional versions of SugarCRM?
SugarPredict enhances Market and Sell today. Our non-Sell customers are welcome to move to the Sell version and benefit from SugarPredict and various other products like Sugar Discover for historical pipeline analysis and reporting.

I am a Market customer. How do I know if I have SugarPredict?
There will be an in-app notification when you sign-in. We will also send an email notification.

I am a Sell customer. How do I know if I have SugarPredict?
There will be an in-app notification when you sign-in. We will also send an email notification.

Where can I find more details on SugarPredict?
You're welcome to review the SugarPredict support site here. USER GUIDE

I am a Sell and/or Market customer. Why don't I have SugarPredict?
Not all customers have sufficient data to support the use of SugarPredict AI models. AI requires sufficient data to be able to have true predictive capabilities. Customers with insufficient data to qualify for SugarPredict can work with their customer success representatives to identify potential data problem areas and develop plans for improvement to enable AI. For information on what data is required, please contact your Customer Service Manager.