HD-CX Campaign
Q4FY21 to FY22

Three Phases

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Campaign Objective

To bring awareness and education around the concept of HD-CX. HD-CX is a new standard for customer experience that helps companies achieve a clear view of the customer driving higher performance and enabling improved predictability.

Phase I: Introduction of HD-CX

Phase II: Justification of HD-CX with Independent Research

Phase III: Education and Growth of HD-CX Strategies

Why Launch HD-CX?

As a part of the brand story, HD-CX aligns with who SugarCRM is, the products we sell, and our market differentiators. Therefore, it is essential that we tell this narrative and ensure the market is aware of it through a series of brand related campaigns that increases awareness about SugarCRM and establishes our brand as synonymous with customer experience.
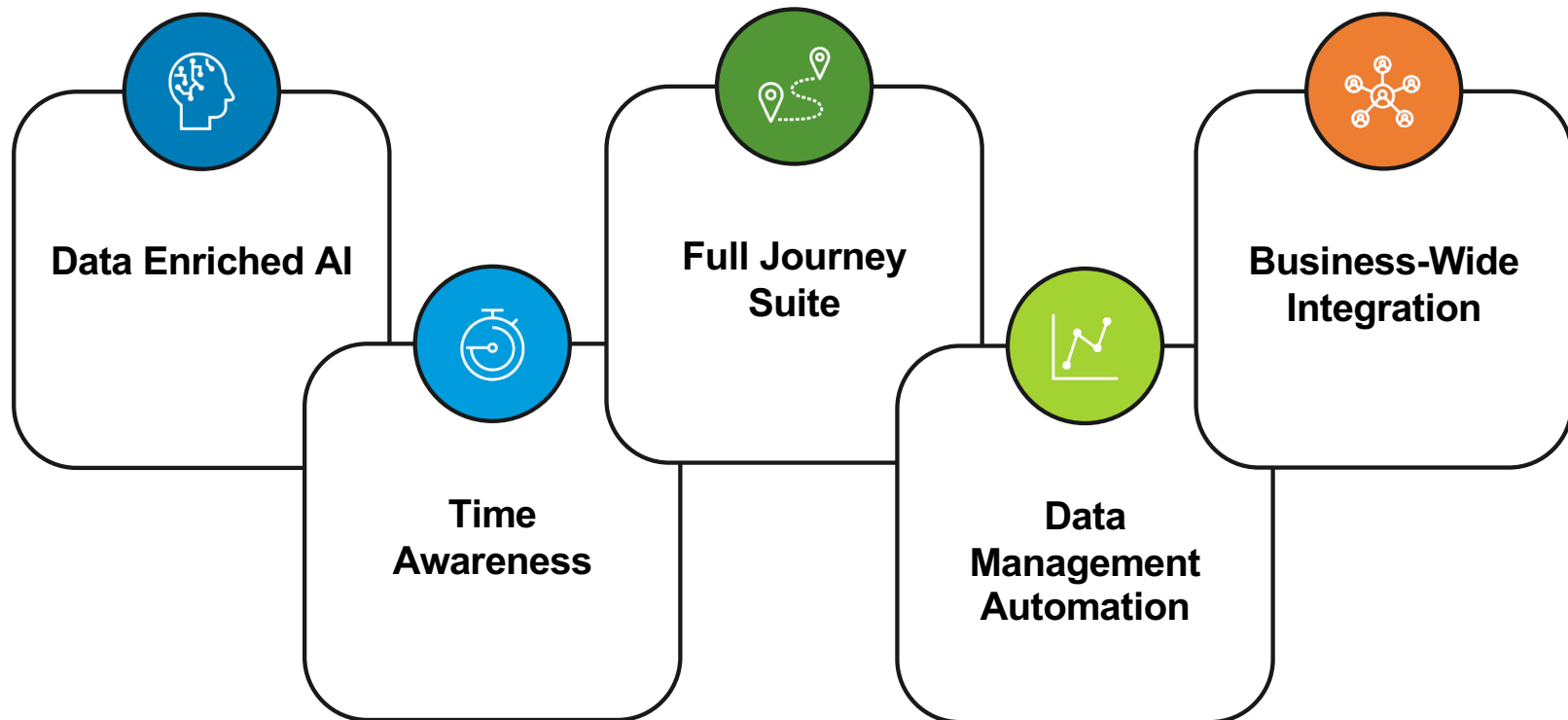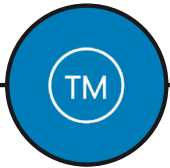
Value Proposition

The ability to unlock a high-fidelity view of your customers to increase revenue opportunities and reduce customer churn.
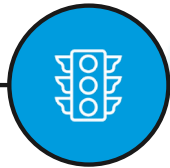
Aligning HD-CX with Sugar Product Messaging

Data Enriched AI

Time Awareness

Full Journey Suite

Data Management Automation

Business-Wide Integration

Measuring Success

Brand Awareness
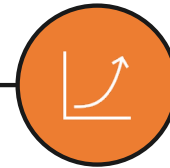Search volume for SugarCRM, HD-CX

Traffic
Total traffic to HD-CX assets

Engagement
Content Downloads, Blog visits, Social Engagement
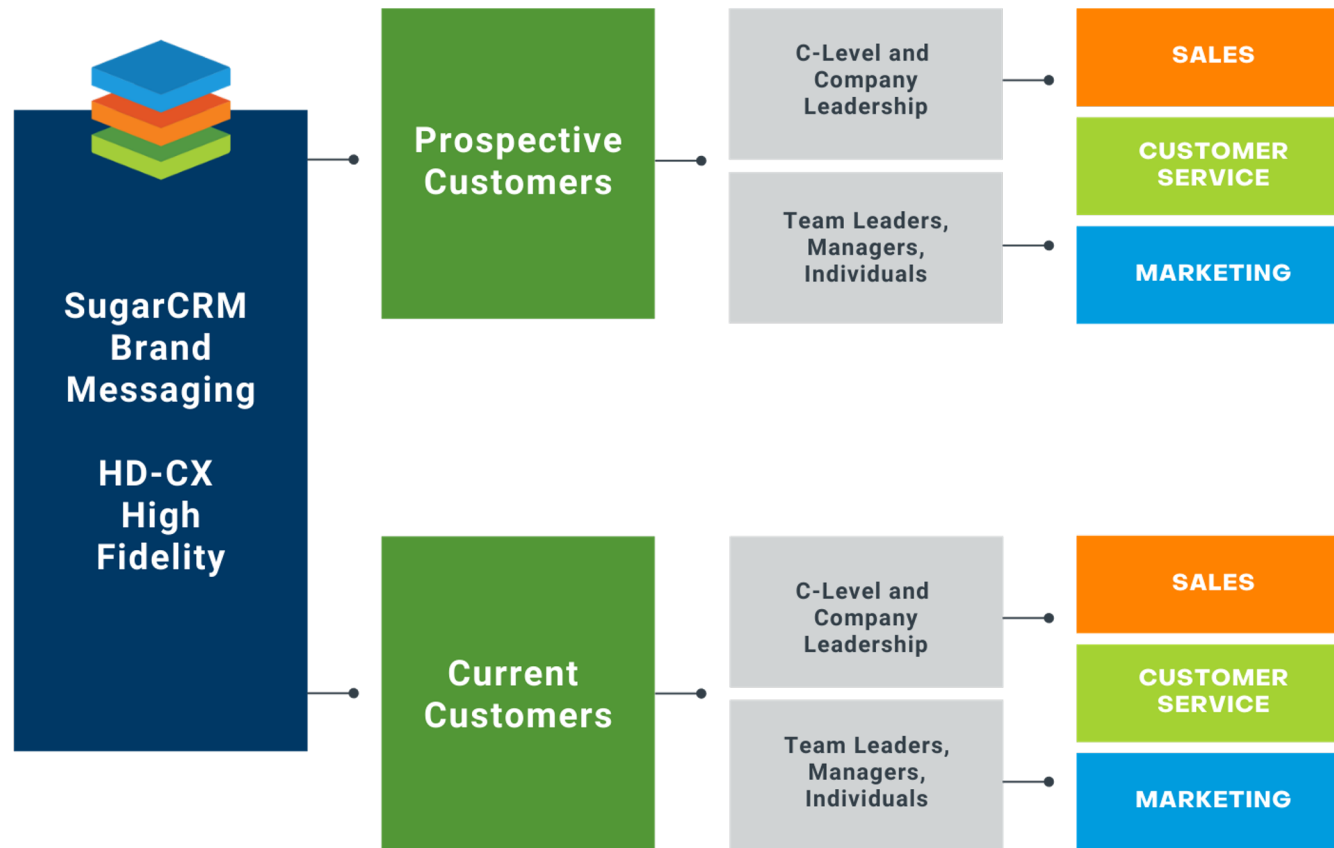
Marketing Qualified Leads
Report downloads, Scorecard submissions, nurtured leads

Geographic Considerations and Languages

Translations Available: English, German, French, Spanish, Italian

- ● United States
- ● United Kingdom
- ● Germany
- ● Australia

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HD-CX Messaging Audiences

Marketing – B2B Target Segmentation

Identify new target segments offering high conversion probability and growth potential

Challenges

- Lack of detailed customer and market data
- Specificity of common traits

How high fidelity helps

- Full customer history of past success
- Enrichment data for firmographics
- AI to identify and score segments, calculate TAM
- Marketing attribution

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Sales – From Seller to Trusted Advisor

Enabling consultative sales with targeted, prescriptive recommendations that

Challenges

- Research
- Qualification
- Anticipating customer needs

How high fidelity helps

- Opportunity to rep matching
- Sales intelligence
- Next best action guidance
- Insight into customer behavior, intent, and sentiment
- Product recommendations

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Service – Churn Prediction

Predicting which customer accounts are at-risk to churn
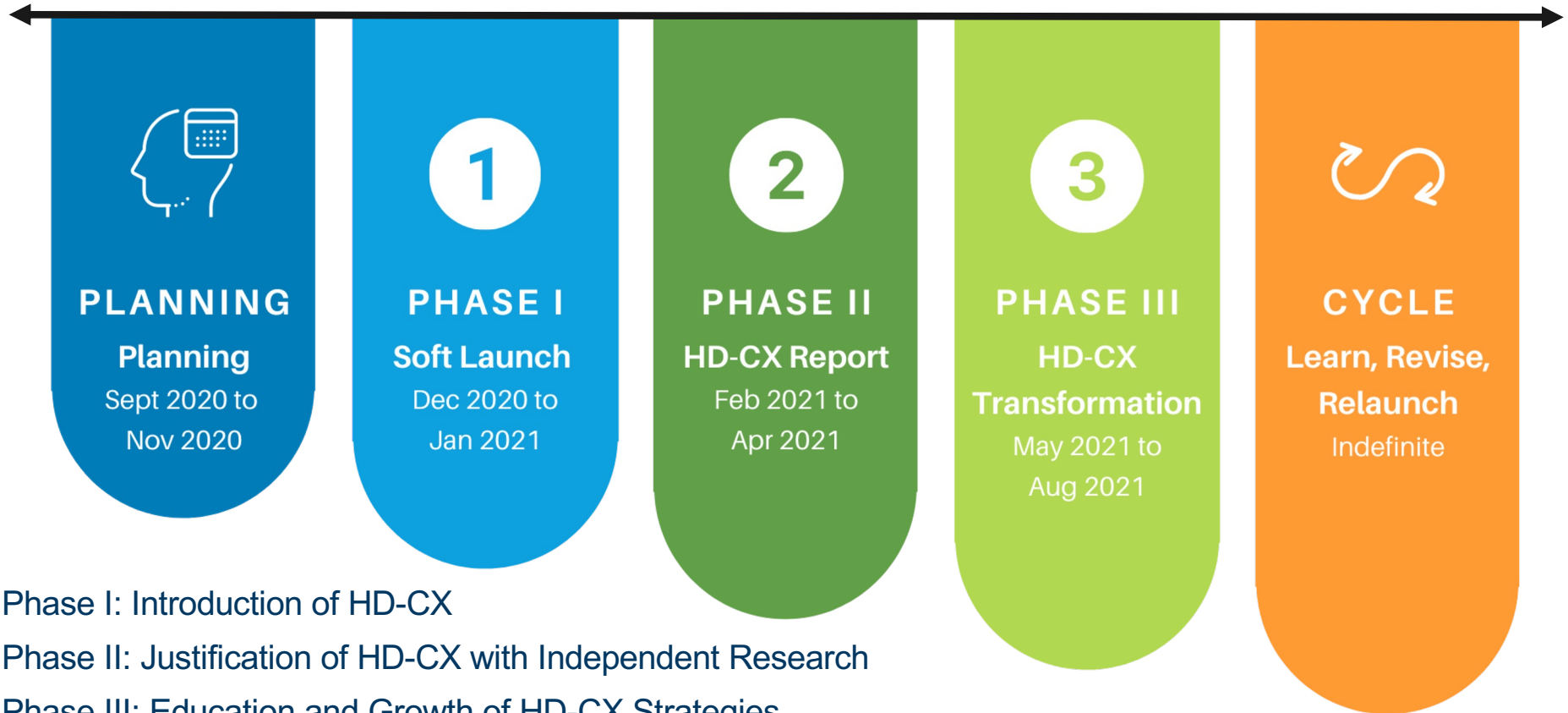
Challenges

- Distributed customer data
- Unknown relevant traits
- Timely identification

How high fidelity helps

- Consolidated customer data
- Data-enriched AI
- Leading indicator prediction signals

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Timeline and Phase Breakdown

PLANNING
Planning
Sept 2020 to Nov 2020

PHASE I
Soft Launch
Dec 2020 to Jan 2021

PHASE II
HD-CX Report
Feb 2021 to Apr 2021

PHASE III
HD-CX Transformation
May 2021 to Aug 2021

CYCLE
Learn, Revise, Relaunch
Indefinite

Phase I: Introduction of HD-CX

Phase II: Justification of HD-CX with Independent Research

Phase III: Education and Growth of HD-CX Strategies

PLANNING

Planning

May 2020 to Nov 2020

Define HD-CX Refine Messaging

Introduction and Vision with Narwhal

Commissioning HD-CX Global Research Report

Communications and Campaign Planning

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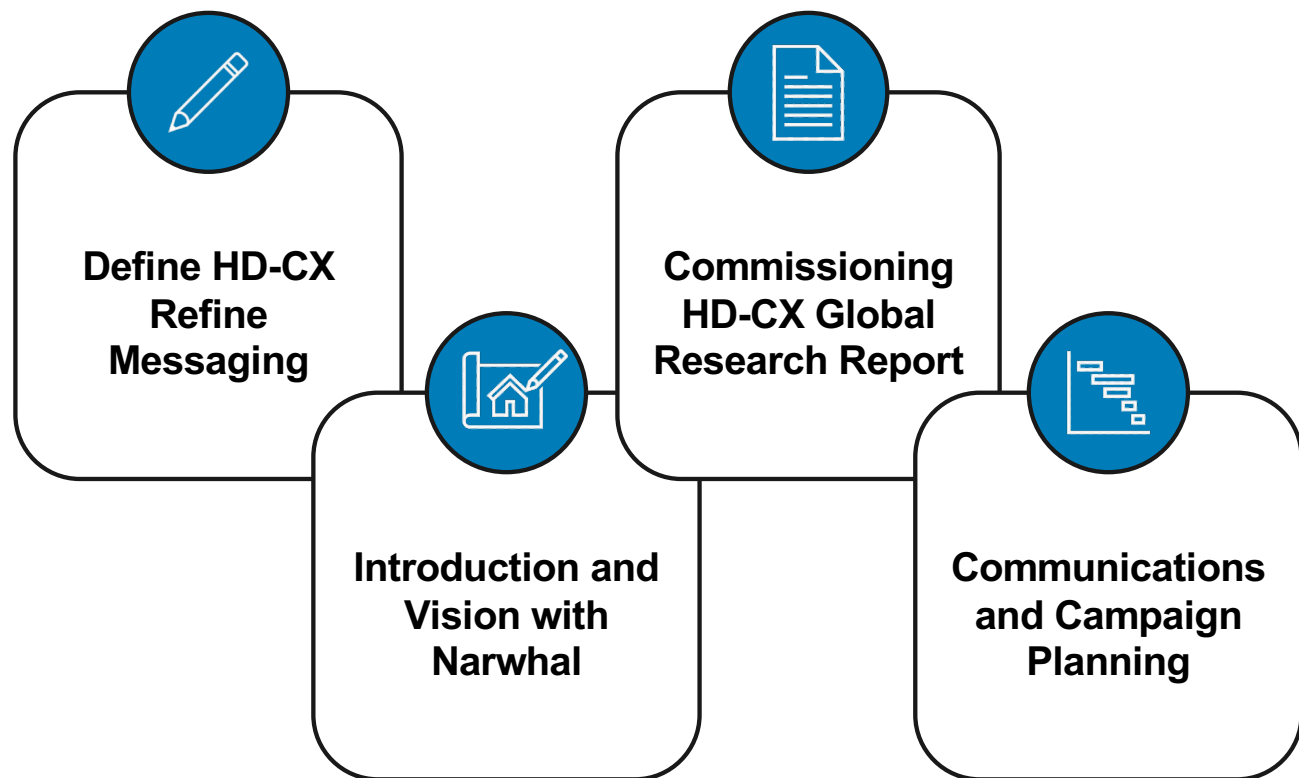
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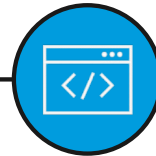**PHASE I**
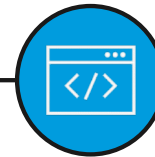
Soft Launch

Dec 2020 to Jan 2021

Assets
- 5 Reasons eBook
- 5 Reasons Infographic
- HD-CX Video
- 5 Reasons Webinar

Social Media Launch
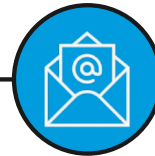**December 2020**

HD-CX Hub
December - February

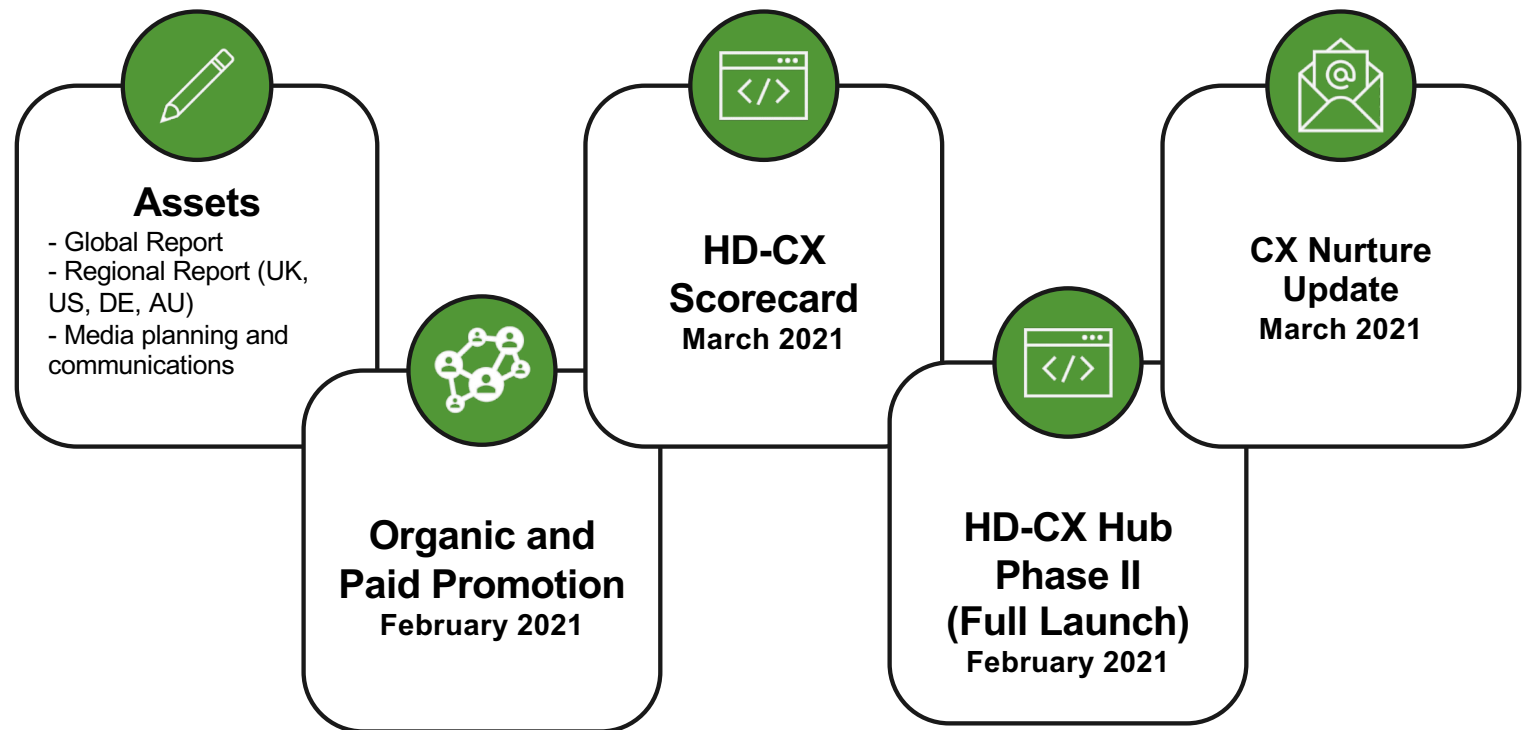**HD-CX Paid Media Launch**
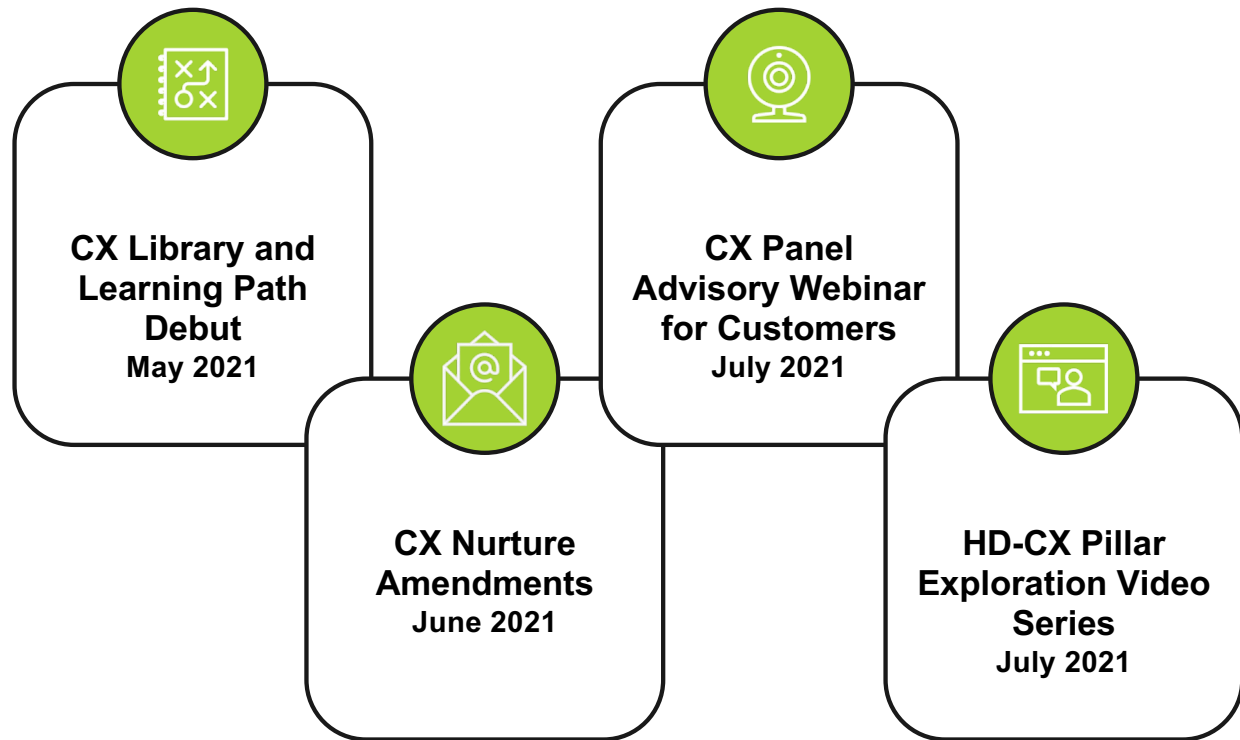**January 2021 (Budget dependent)**

CX Nurture Launch
January 2021

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PHASE II

HD-CX Report

Feb 2021 to Apr 2021

Assets
- Global Report
- Regional Report (UK, US, DE, AU)
- Media planning and communications

Organic and Paid Promotion
February 2021

HD-CX Scorecard
March 2021

HD-CX Hub Phase II (Full Launch)
February 2021
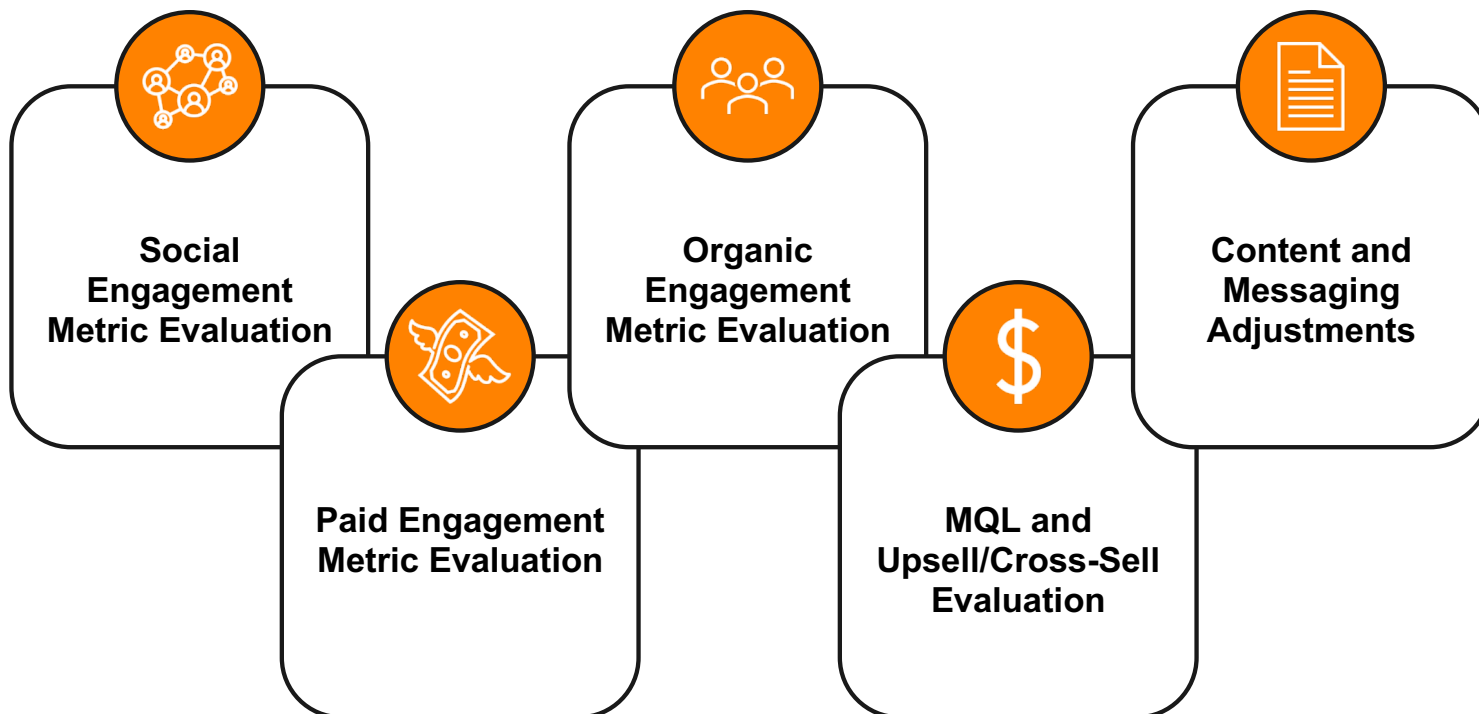
CX Nurture Update
March 2021

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PHASE III

HD-CX Transformation

May 2021 to Aug 2021

CX Library and Learning Path Debut
May 2021

CX Nurture Amendments
June 2021

CX Panel Advisory Webinar for Customers
July 2021

HD-CX Pillar Exploration Video Series
July 2021

CYCLE
Learn, Revise, Relaunch
Indefinite

Social Engagement Metric Evaluation

Paid Engagement Metric Evaluation

Organic Engagement Metric Evaluation

MQL and Upsell/Cross-Sell Evaluation

Content and Messaging Adjustments

Visual Direction Overview

Visual Direction - Content

Visual Direction - Video

CUSTOMER CHALLENGES + NEEDS

MAGIC HAPPENS
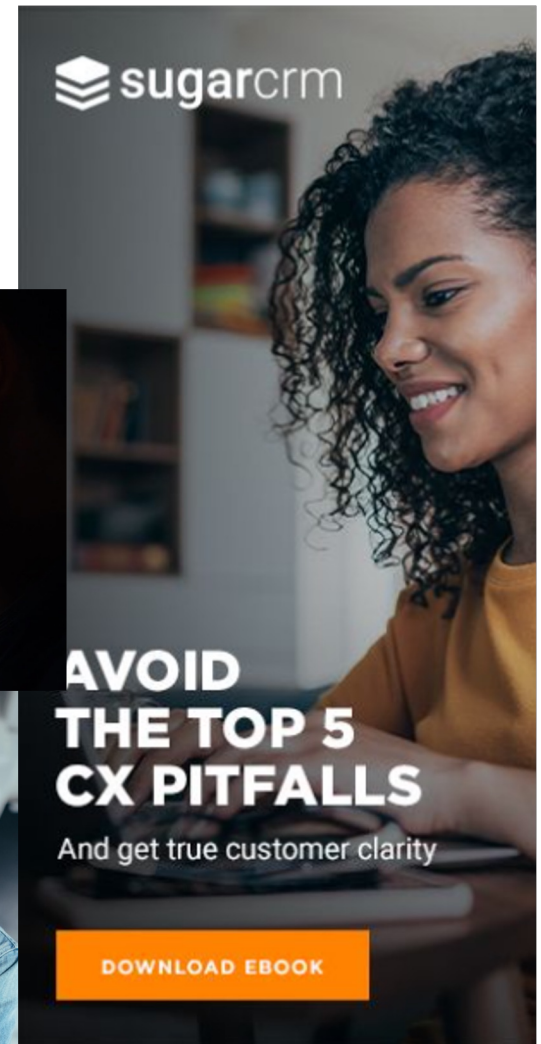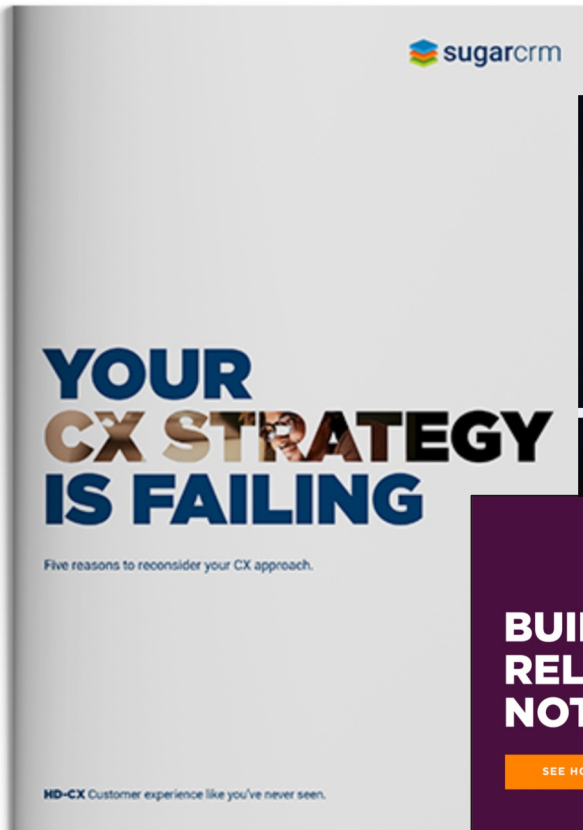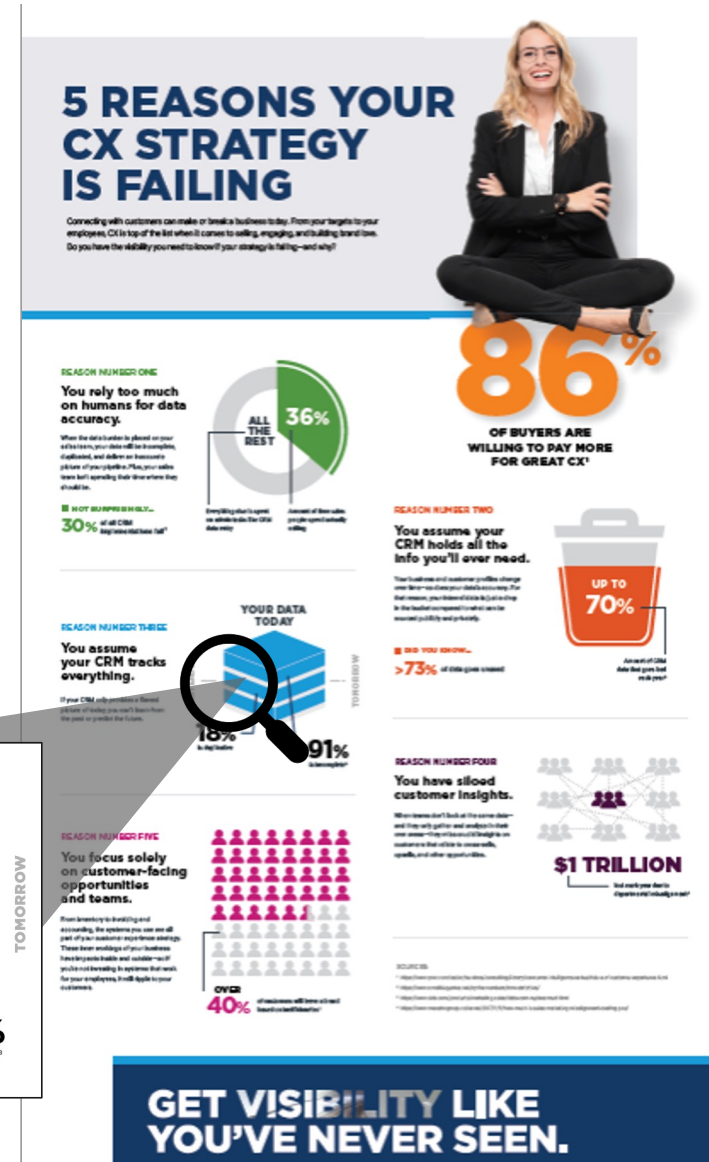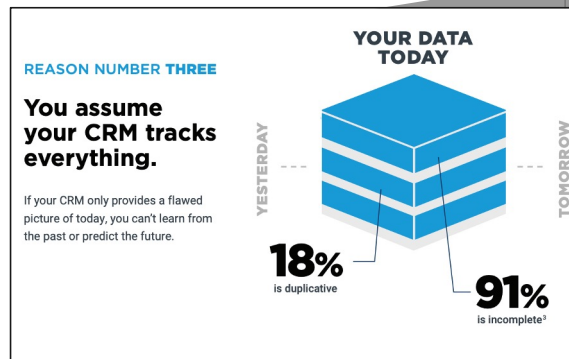
ADMIN WORK

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SugarCRM HD-CX Video
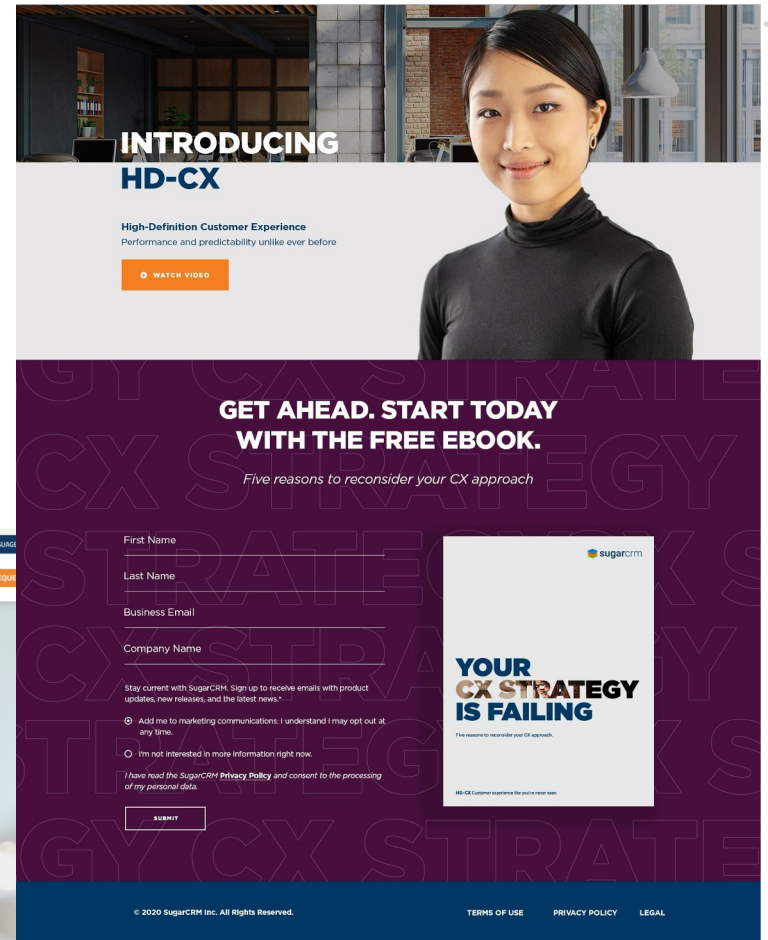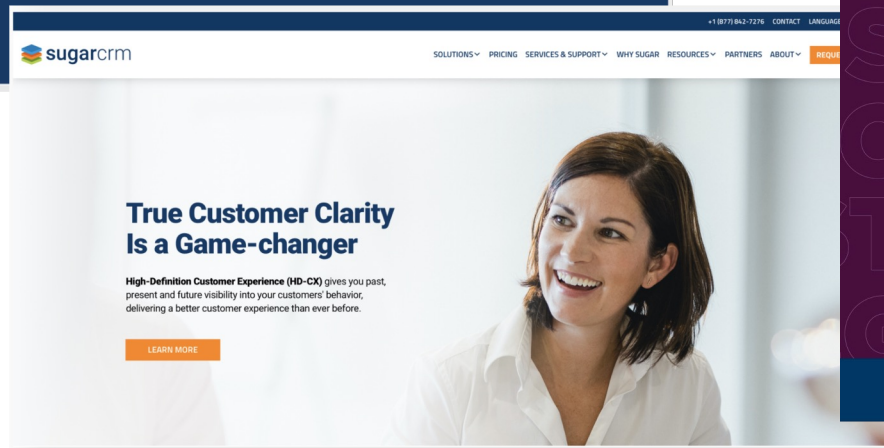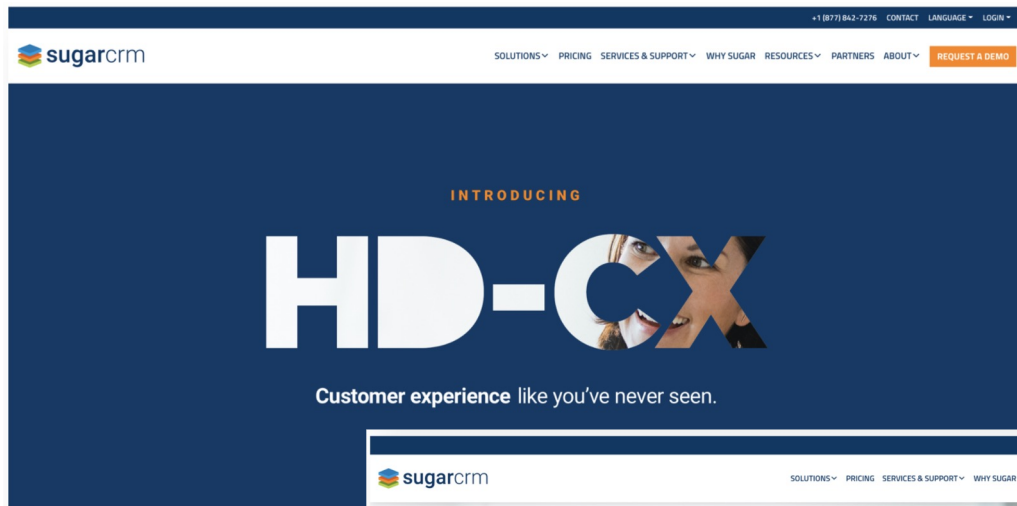
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Visual Direction - Media
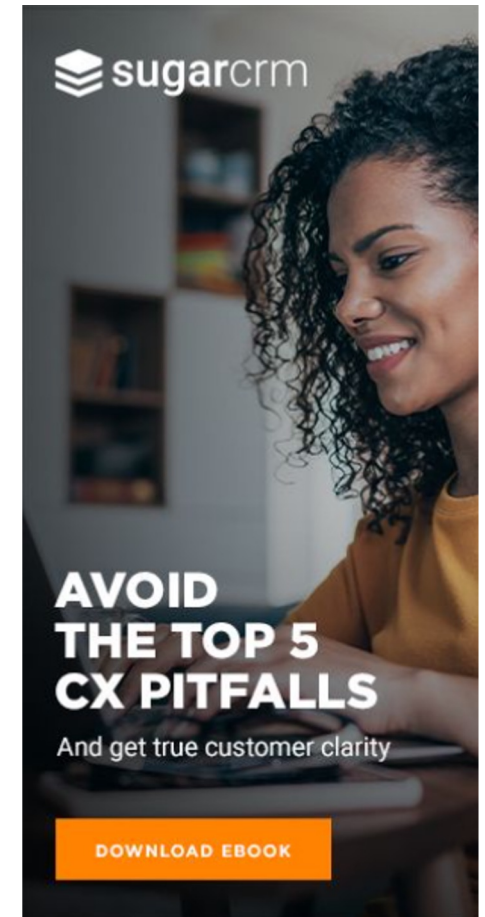
Visual Direction - Web

Campaign Components and Plans

- HD-CX Internal Hub
- Campaign Folder
  - Phase I Content – 5 Reasons eBook
  - Phase II Content – Research Report
  - Phase III Content - Content Strategy
- Phase I Launch Dates
- HD-CX Content Roadmap
- Email
- Media Plan

- Social Media Calendar
  - Phase I Blog Social Messaging
  - Phase I Overall Messaging

- (Budget)