

SERVICE

Definition



Overview

Provident CRM is a specialist **SugarCRM consultancy** and implementation partner, delivering customer relationship management solutions that enable organisations to build stronger, more profitable and more transparent relationships with their customers. Our focus is on practical outcomes, long-term value and services that are tailored to the specific needs of each client.

We support organisations across the public and private sectors with consultancy, implementation, configuration, integration, training and ongoing managed support services for SugarCRM.

About Provident CRM

Provident CRM is an experienced SugarCRM partner with a strong track record of delivering CRM solutions that align technology with real business processes. We work closely with customers to understand their objectives, challenges and operational constraints before recommending and delivering a solution.

Our approach is collaborative and outcomes-driven. We prioritise usability, adoption and measurable improvements in efficiency, insight and customer engagement.



SugarCRM Overview



SugarCRM is a flexible and scalable customer experience platform designed to support sales, marketing and customer service teams. It provides a complete view of customers across the entire lifecycle, enabling organisations to make informed decisions, improve engagement and increase productivity.

SugarCRM is widely used by organisations of all sizes and across multiple sectors, offering an open architecture that can be configured and extended to meet specific operational requirements.



Services Provided

CRM Consultancy

Provident CRM provides expert consultancy services to help organisations define their CRM strategy, requirements and roadmap. This includes process mapping, stakeholder workshops, system design and best practice guidance.

Implementation and Configuration

We deliver full SugarCRM implementations, from initial setup through to go-live. Services include:

- > System configuration and customisation
- > Module and workflow design
- > Data modelling and security roles
- > User interface optimisation



Data Migration

We support secure and structured data migration from legacy systems into SugarCRM, including data cleansing, validation and reconciliation to ensure accuracy and integrity.

Integration Services

Provident CRM designs and implements integrations between SugarCRM and third-party systems such as finance platforms, marketing tools, document management systems and telephony solutions. Integrations are delivered using SugarCRM APIs and industry-standard methods.

Training and Enablement

We provide tailored training services to ensure users and administrators are confident using the system. Training can be delivered remotely or on-site and is adapted to specific roles and responsibilities.

Managed Support Services

Our ongoing support services ensure SugarCRM continues to operate effectively after implementation. Support offerings include:

- > Incident and issue management
- > System administration support
- > Configuration changes and enhancements
- > Release and upgrade support

Functional Capabilities



Sales Management

- > Lead, contact and opportunity management
- > Pipeline and forecast management
- > Activity tracking and reporting
- > Subscription and renewals support

Marketing Enablement

- > Campaign management
- > Lead tracking and segmentation
- > Marketing automation integration
- > Performance and ROI reporting

Customer Service and Case Management

- > Case and ticket management
- > Automated routing and escalation
- > Knowledge base support
- > Customer portals and self-service options

Reporting and Dashboards

- > Real-time reports
- > Role-based dashboards
- > Executive-level insights
- > Custom metrics and KPIs

Deployment Options

SugarCRM can be deployed in multiple ways depending on organisational requirements:

- > Cloud-hosted environments
- > On-premise deployments

Provident CRM advises on the most appropriate deployment model based on security, compliance, performance and scalability needs.



Security and Data Protection

SugarCRM supports GDPR-aligned data handling through configurable security roles, audit trails and access controls. Provident CRM designs solutions that follow data protection by design and default principles, supporting organisations in meeting their compliance obligations.

Security considerations include:

- > Role-based access control
- > Data encryption
- > Audit logging
- > Secure integrations

Support and Service Levels

Provident CRM provides clear support processes and service levels aligned to customer needs. Support services are delivered during UK business hours, with options for extended cover by agreement.

Escalation paths are defined to ensure issues are addressed promptly and effectively.

Documentation

Comprehensive user and administrator documentation is provided as part of the service. This includes configuration guides, process documentation and training materials tailored to the implemented solution.

Continuous Improvement

We work with customers on an ongoing basis to review system usage, identify improvement opportunities and ensure the CRM platform continues to support evolving business needs.



Advantage Packages

Provident CRM provides expert consultancy services to help organisations define their CRM strategy, requirements and roadmap. This includes process mapping, stakeholder workshops, system design and best practice guidance.

Packages and Services

ESSENTIALS

25 hours/year

A foundational package offering core support and insights for smooth system operation

- > 2 allocated monthly hours*
- > CSM meetings
- > SugarCRM roadmap sessions
- > QBR meetings
- > Account insights
- > Core SugarCRM technical support
- > SugarCRM core configuration assistance

PLUS

50 hours/year

A mid-level package with enhanced support, tailored system improvements, and deeper engagement system operation

- > 2 allocated monthly hours*
- > CSM meetings
- > SugarCRM roadmap sessions
- > QBR meetings
- > Account insights
- > Core SugarCRM technical support
- > SugarCRM core configuration assistance
- > End-user system overviews
- > New use case setup

ELITE

75 hours/year

A premium package with comprehensive support, strategic guidance, and advanced technical enhancements

- > 4 allocated monthly hours*
- > CSM meetings
- > SugarCRM roadmap sessions
- > QBR meetings
- > Account insights
- > Core SugarCRM technical support
- > SugarCRM core configuration assistance
- > End-user system overviews
- > New use case setup
- > SugarCRM add-ons training
- > Assigned technical consultant
- > On-site meetings

*All allocated monthly hours should be used within the allocated month. Allocated hours cannot be carried forward and expire monthly if unused. For the Plus and Elite packages, the remaining hours can be used at any time. It is recommended to budget these hours with our team to ensure quarterly objectives can be met. Terms & Conditions apply.

SugarCRM core configuration assistance includes: Process Definitions, Calculated Fields, Role Based Views, Module Field Layouts, New Field Creation, Report Creation, New User Set Up, Module Creation Assistance, Custom Dashboard Creation.



For further information or to discuss requirements, please contact Provident CRM through the official company website.



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