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Sugar Sell Foundations Webinar Series: Week 5
Less Busywork, More Selling – Automating Your Sugar Workflows
Webinar Handout

Grab a pen (or your keyboard!) and have some fun reinforcing what you learned in today's session. These activities are designed to be quick, light, and useful—just like good automation.

✏️ Activity 1: Fill in the Blanks

Complete the sentences using concepts from the webinar.

1. Automation doesn't fix _____ processes.
2. Automation should feel like a helpful _____, not another to-do list.
3. Automation is a _____ scale, not all or nothing.
4. Early-stage deals usually require more _____, while late-stage deals benefit from more structure.
5. Exception reports help highlight what's _____ or at risk.
6. The goal of automation is to reduce _____, not selling time.
7. Tasks and reminders should guide, not _____.
8. Automation works best when it supports regular _____ the Business (RTB) rhythms.

🔎 Activity 2: Word Search

Find the Sugar automation words hidden below. Words can appear horizontally, vertically, or diagonally.

Word List:

AUTOMATION

BUSYWORK

WORKFLOW

EXCEPTION

PIPELINE

COACHING

REPORTS

TASKS

REMINDERS

RTB

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Z B D A X S S B J K Z X P B O U O G H G
Z C N W A K H T E B O R B J T M Z P I W
D N J J V I O C Y U P U W H T Q Z B C N
F B G B U D Y O Z R E C V K Q F N H G V
E S R P J W V A R J B Q Z J V B W P A F
W X Z A R T F C F O F C O R D Z R W U L
D I C B N V Z H U V G P D T I M M O T K
N U N E U J B I D B Z E V B Y E P R O I
G M A Y P S K N G R I Y O A Q M F K M I
S U E T P T Y G O F T L S N V N O F A V
A F T M W N I W A R P P T N K J T L T B
C C G T S W T O O R E I M W I V J O I Y
P V E C H L X W N R E M P Q T V R W O Q
V G G D Y J Y A K J K P I E Z K U P N H
D H G T A I T R W T S A O N L Q O E R E
E H R R R M A L C Q L P P R D I D Y Z Q
U R L Z H Z S T P B W D Q M T E N A T O
B S E J N D K C R V P K C Z R S R E F B
L H R X O S S A A W U Y W Y X Z F S Y O
V A P K E C I M F T X E H P W B V Y W E
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🔗 Activity 3: Matching

Draw a line between the concept on the left with it's best description on the right.

Concept	Description
1. Automation Sliding Scale	A. Highlights deals or activities that need attention
2. Busywork	B. Regular operating rhythms like pipeline reviews
3. Exception Reports	C. Manual, repetitive sales tasks
4. RTB (Run the Business)	D. Manual → Assisted → Automated
5. Good Automation	E. Predictable, helpful, and easy to explain

✅ Bonus Reflection (Optional)

Answer just one—no wrong answers!

- One task I'd love Sugar to automate for me is: _____

- One report I should review more often is: _____

🎯 Thanks for Joining Us!

Remember: start small, automate intentionally, and let Sugar do the busywork—so you can focus on selling.

(Answer key available after the webinar!)