

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 **broken** processes.
2. Automation should feel like a helpful **assistant**, not another to-do list.
3. Automation is a **sliding** scale, not all or nothing.
4. Early-stage deals usually require more **flexibility**, while late-stage deals benefit from more structure.
5. Exception reports help highlight what's **missing** or at risk.
6. The goal of automation is to reduce **busywork**, not selling time.
7. Tasks and reminders should guide, not **nag**
8. Automation works best when it supports regular **Run** 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

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 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

RTB

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🔗 Activity 3: Matching

Draw a line between the concept on the left with its 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.