



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 **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 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

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.