



Sugar Sell Foundations Webinar Series: Week 2

## From Chaos to Clarity: Opportunity Management That Works

Webinar Fill-in the Blank Handout

### 1. Why Opportunity Management Matters

Opportunities are where your \_\_\_\_\_ takes shape.

Effective opportunity management defines overall \_\_\_\_\_ health.

The Cost of Chaos includes:

- Inaccurate \_\_\_\_\_
- Missed \_\_\_\_\_
- Confusing or inconsistent \_\_\_\_\_

Good opportunity management enables:

- Clearer \_\_\_\_\_
- Better team \_\_\_\_\_
- More predictable \_\_\_\_\_

### 2. Designing Effective Sales Stages

#### A. Reflect Buyer Commitments

A stage should only advance when the \_\_\_\_\_ shows real movement.

Avoid using stages based on rep actions like “\_\_\_\_\_” or “\_\_\_\_\_”.

These are tasks—not signs of buying intent.

Why this matters:

- Produces more accurate \_\_\_\_\_
- Reduces \_\_\_\_\_
- Standardizes pipeline interpretation

Example stage: **Validated Needs**

Confirmed when the buyer agrees on \_\_\_\_\_ and \_\_\_\_\_.

#### B. Clear Entry + Exit Criteria

Each stage needs explicit:

- **Entry Criteria:** “What must be \_\_\_\_\_ for a deal to be placed in this stage?”
- **Exit Criteria:** “What must be \_\_\_\_\_ for a deal to move forward?”

Why this matters:

- Ensures consistency across \_\_\_\_\_
- Eliminates \_\_\_\_\_
- Makes forecasting meetings more \_\_\_\_\_

Example (Negotiation Stage):

Entry: Buyer confirms you're a \_\_\_\_\_, and pricing has been \_\_\_\_\_.

**Exit: Buyer agrees to \*\* \_\_\_\_\_ \*\*, or deal is \*\* \_\_\_\_\_ \*\*.**

### C. Probability Tied to Stage

Forecast probability should be \_\_\_\_\_-driven, not manually changed.

Examples:

- Qualification → \_\_\_\_\_ %
- Needs Analysis → \_\_\_\_\_ %
- Proposal → \_\_\_\_\_ %
- Negotiation → \_\_\_\_\_ %
- Closed Won → \_\_\_\_\_ %

Tip: Focus on \_\_\_\_\_ accuracy, not adjusting probability to match optimism.

### D. Keep Early Stages Simple

Why simplicity matters:

- Early-stage deals are \_\_\_\_\_ and prone to change
- Too many categories slow down \_\_\_\_\_
- Simpler funnels improve \_\_\_\_\_

Recommended:

One or two early stages → \_\_\_\_\_ and \_\_\_\_\_

Focus early stages on questions like:

- Is this opportunity \_\_\_\_\_ ?
- Is there a buyer with a \_\_\_\_\_ we can solve?

## 3. Methodology Alignment (MEDDICC, BANT, etc.)

Sugar supports all sales methodologies through:

- Fields
- \_\_\_\_\_
- \_\_\_\_\_
- Purpose: Reinforce—not \_\_\_\_\_ —the process.

## 4. Operationalizing Best Practices in Sugar

### Exception Reports That Matter

Identify deals missing critical info:

- Past-due \_\_\_\_\_
- No activity in \_\_\_\_\_ days
- No \_\_\_\_\_
- Missing key \_\_\_\_\_
- Stage \_\_\_\_\_

### Cleaning Up Your Existing Pipeline

Actions include:

- Closing \_\_\_\_\_ deals
- Standardizing \_\_\_\_\_
- Removing outdated \_\_\_\_\_
- Aligning stages to the \_\_\_\_\_

### Driving Adoption & Consistency

Teams succeed when you:

- Document the \_\_\_\_\_
- Provide examples & \_\_\_\_\_
- Use role-based \_\_\_\_\_
- Add automation & \_\_\_\_\_
- Reinforce through \_\_\_\_\_

## 5. The One-View Advantage

Sugar's One-View offers:

- A unified \_\_\_\_\_ record
- A shared \_\_\_\_\_ timeline
- A consistent story across \_\_\_\_\_
- No duplicate \_\_\_\_\_

## 6. Day in the Life of a Seller

### Morning Pipeline Review

Seller logs in and sees a prioritized \_\_\_\_\_.

Identifies opportunities with past-due \_\_\_\_\_ and reviews upcoming \_\_\_\_\_.

### Updating Opportunities

Reps update:

- Expected \_\_\_\_\_ date
- Next \_\_\_\_\_
- Activity \_\_\_\_\_
- Stage \_\_\_\_\_

### Working an Active Deal

Sugar automatically:

- Updates \_\_\_\_\_
- Requires methodology \_\_\_\_\_
- Suggests related \_\_\_\_\_

### Pipeline Review With Manager

Reviews include:

- Stage-by-stage \_\_\_\_\_
- Deals with no \_\_\_\_\_
- Forecast by \_\_\_\_\_
- Coaching based on \_\_\_\_\_ data

## 7. Key Takeaways

- Structure = \_\_\_\_\_ + \_\_\_\_\_
- Stages reflect \_\_\_\_\_ **commitments**
- Sugar helps operationalize \_\_\_\_\_
- A clean pipeline drives better \_\_\_\_\_
- Reps thrive with a clear, simple \_\_\_\_\_

