



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 (MEDDIC, 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 _____

