



# From Chaos to Clarity: Opportunity Management that Works

Sugar Sell Foundation Webinar Series


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December 2025

Andrea Ayers, Sr. Product Trainer & Instructional Designer

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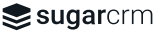
## Presenters



**Andrea Ayers**  
**Sr. Product Trainer & Instructional Designer**  
SugarUniversity  
SugarCRM

#SugarCRMu  
[university@sugarcrm.com](mailto:university@sugarcrm.com)

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## Agenda

1. Why Opportunities Management Matters
2. Designer Effective Sales Stages
3. Operationalizing Best Practices in Sugar
4. The One-View Advantage
5. Day in the Life of a Seller
6. Key Takeaways and Q&A

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**Poll Question:**  
**How would you describe your current opportunity management process?**

- A. Totally chaotic
- B. Could be better
- C. Pretty organized
- D. A well-oiled machine

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## Poll Question: What's your biggest challenge when tracking opportunities?

- A. Data accuracy / incomplete info
- B. Visibility across teams
- C. Forecasting reliability
- D. Consistency in process
- E. Lack of adoption
- F. Other (add more info in chat)



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## Why Opportunity Management Matter?

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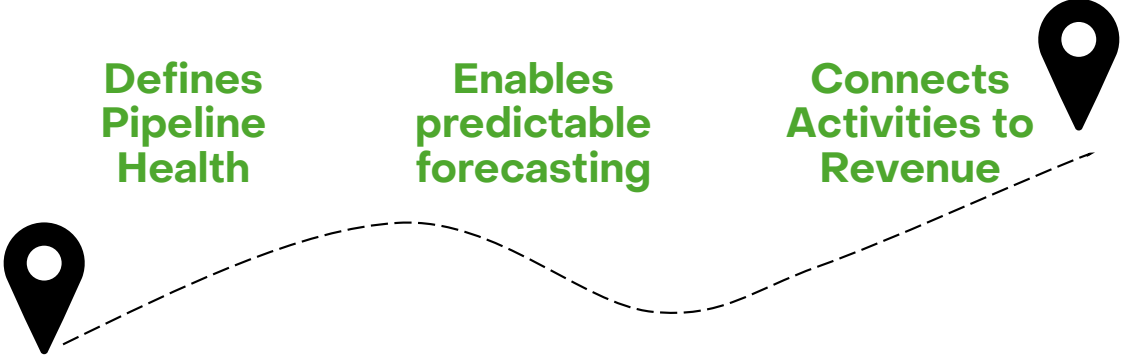
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## Opportunities: Where Your Revenue Story Takes Shape

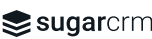
Defines Pipeline Health

Enables predictable forecasting

Connects Activities to Revenue









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






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## The Cost of Chaos

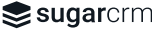




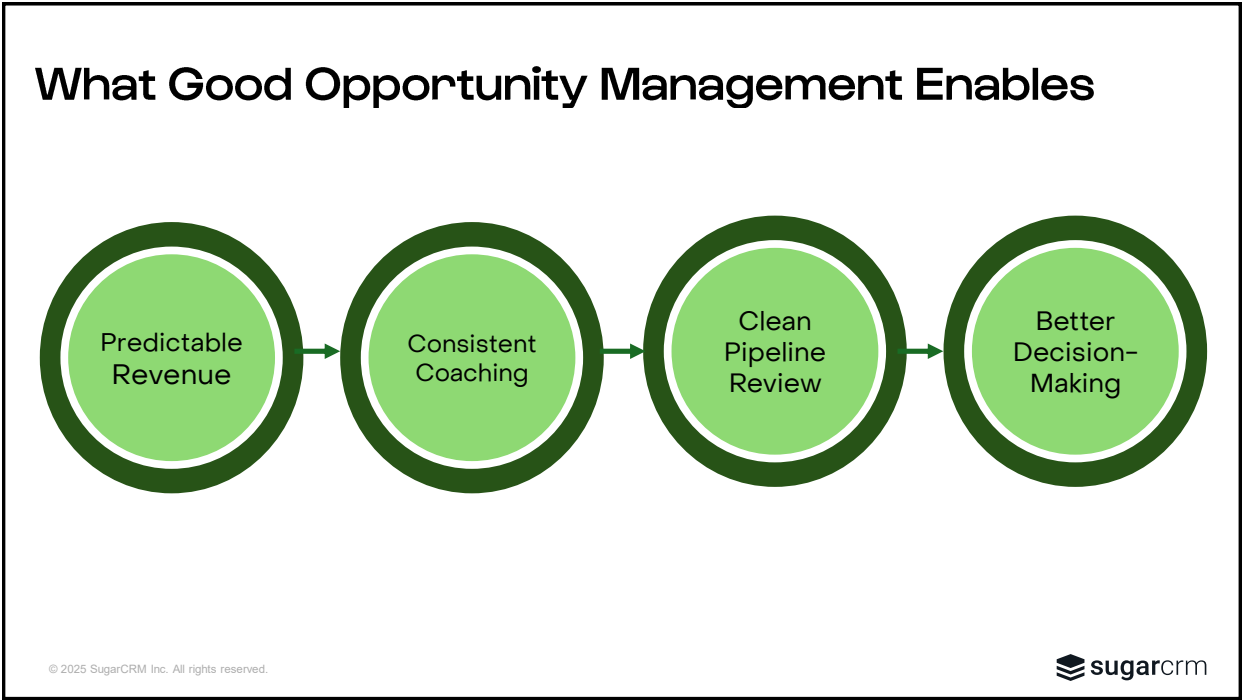




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A green arrow pointing to the right, containing a black line graph with an upward trend.

### Poll Question:

**How confident are you in the accuracy of your current sales forecasts?**

- A. Very confident
- B. Somewhat confident
- C. Not confident
- D. What forecast? 🤪

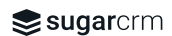
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# Designer Effective Sales Stages

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## Designing Your Sales Stages: Best Practices

- Reflect buyer commitments

### What this means:

- A stage should only advance when the **customer demonstrates real movement**
- Avoid stages based on rep actions like *"Demo Completed"* or *"Proposal Sent."*  
These are tasks—not indicators of buying intent.

### Why it matters:

- Buyer-driven stages produce **more accurate forecasting**.
- They minimize "happy ears"
- They standardize pipeline interpretation across the entire organization.

### Example:

✓ *Validated Needs* — confirmed by the buyer's agreement on pain points and success criteria.

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## Designing Your Sales Stages: Best Practices

- Reflect buyer commitments
- Clear entry + exit criteria

Every stage should have explicit rules that describe:

**Entry Criteria**

- “What must be true for a deal to be placed in this stage?”

**Exit Criteria**

- “What must be true for a deal to move to the next stage?”

**Why it matters:**

- **Creates consistency** across reps and regions.
- **Eliminates ambiguity**
- Makes forecasting meetings more **strategic**

**Example (Negotiation Stage):**

- **Entry Criteria:** Buyer has confirmed that Your Company is a finalist and Pricing structure has been discussed.
- **Exit Criteria:** Buyer agrees to commercial terms OR the Deal is closed (won/lost).

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## Designing Your Sales Stages: Best Practices

- Reflect buyer commitments
- Clear entry + exit criteria
- Probability tied to stage

Forecast probability should be **system-driven**.

**How it works:**

- Every stage is **assigned a probability** that represents its likelihood of closing based on historical data or standard guidance.

**Example Probability Mapping:**

- Qualification → 10%
- Needs Analysis → 25%
- Proposal → 50%
- Negotiation → 75%
- Closed Won → 100%

**Tip:** Encourage reps to focus on **stage accuracy**, not adjusting probability to compensate for optimism.

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# Designing Your Sales Stages: Best Practices

- Reflect buyer commitments
- Clear entry + exit criteria
- Probability tied to stage
- Keep early stages simple

The most common mistake teams make is adding too many early-stage categories.

**Why simplicity matters:**

- Often fluid, lightly qualified, and prone to change.
- Slow down reps and complicate reporting.

A simple early funnel speeds up adoption and reduces friction.

**Recommended approach: 1 or 2 early stages** for qualification and discovery

**Ask –** *Is this opportunity real? Is there a buyer with a problem we can solve? Should the rep invest more time?*

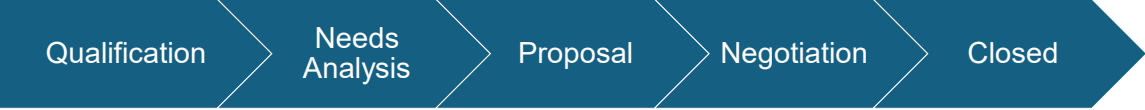
The “meat” of your pipeline detail should begin once the buyer starts making commitments.

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# Examples Stage Structures

• **Simple:**



• **Scaled:**




Changed: Needs Analysis to Discovery  
Adds gates: Validation, Stakeholder Alignment, Legal Review

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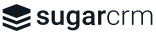
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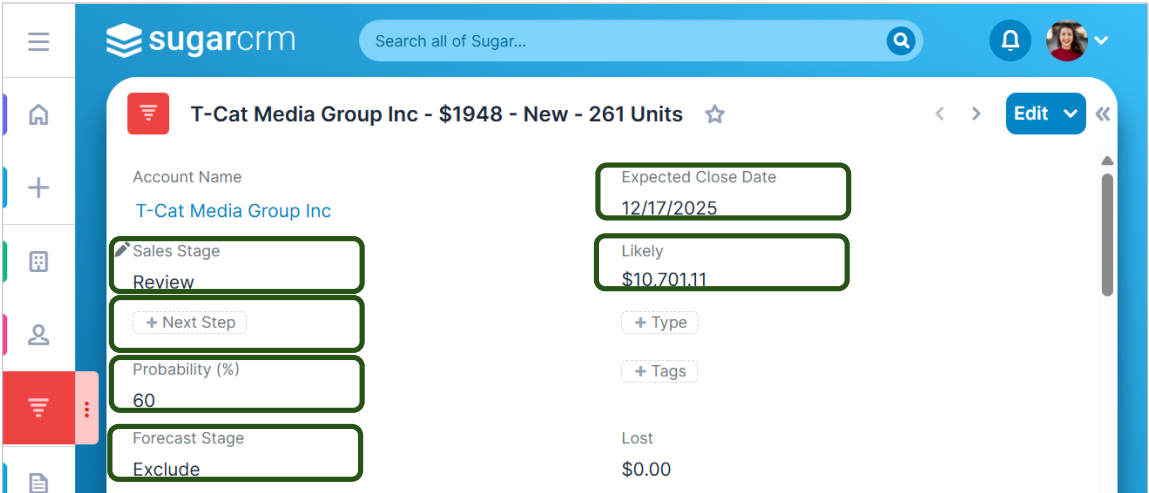
## Methodology Alignment (MEDDICC, BANT, etc.)

- Sugar supports any methodology
- Use fields, checklists, validation
- Reinforce—not police—the process



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## Essential Fields for Forecast Accuracy

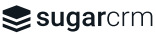


The screenshot displays the SugarCRM interface for a record titled "T-Cat Media Group Inc - \$1948 - New - 261 Units". The interface includes a sidebar with navigation icons, a top search bar, and a main content area. Several fields are highlighted with green boxes to indicate essential fields for forecast accuracy:

- Account Name:** T-Cat Media Group Inc
- Sales Stage:** Review
- Expected Close Date:** 12/17/2025
- Likely:** \$10,701.11
- Probability (%):** 60
- Forecast Stage:** Exclude
- Lost:** \$0.00

Other visible fields include "Next Step", "Type", and "Tags". The interface also shows a "Search all of Sugar..." bar and a user profile icon in the top right corner.

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# Operationalizing Best Practices in Sugar

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## Operationalizing Best Practices in Sugar



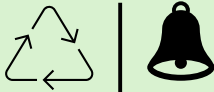
**Exception Monitoring**  
Reports and Dashboards surfacing what's "off track"



**Activity Tracking**  
All Activities Subpanels + Activity Streams + rep-logged interactions



**Required Fields**  
Controlled in Studio (static) or SugarBPM (conditional).



**Automations & Alerts**  
SugarBPM controlling notifications, field changes, routing, and validation logic.

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# The One-View Advantage

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## Sugar's One-View Advantage


**Unified  
Opportunity  
Record**

**Shared  
Activity  
Timeline**

**Consistent  
story across  
teams**

**No Duplicate  
Tracking**

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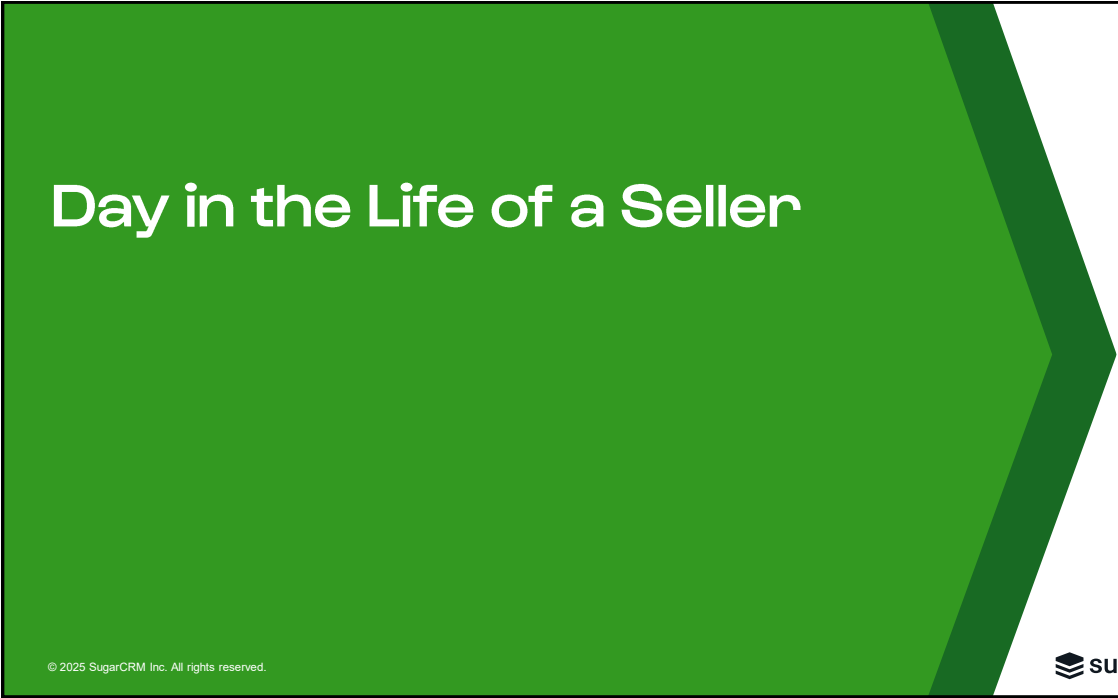
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# Demo Opportunity One View Advantage




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# Day in the Life of a Seller

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## Day in the Life: Morning Pipeline Review

**Jordan (AE) Logs In:**

- Sees prioritized dashboard
- Finds 3 opportunities past close date
- Reviews this week’s Next Steps

- **Jordan D.**  
Account Executive  
XYZ Enterprises

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## Day in the Life: Updating Opportunities

**Jordan updates:**

- Expected Close Date
- Next Step
- Activity history
- Stage movement as appropriate

- **Jordan D.**  
Account Executive  
XYZ Enterprises

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## Day in the Life: Working an Active Deal

### Sugar automatically:

- Updates probability
- Requires methodology fields
- Suggests related stakeholders

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## Day in the Life: Pipeline Review With Manager

- Stage-by-stage breakdown
- Deals with no activity
- Forecast by month
- Coaching based on clean data

- **Will W.**  
West Sales Team Mgr.  
XYZ Enterprises



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### Poll Question:

Which benefit of a modernized opportunity management system is most appealing?

- A. Better forecasting
- B. Higher win rates
- C. Reduced admin burden
- D. More predictable pipeline
- E. Stronger team alignment



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## Key Takeaways / Q&A

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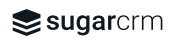


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## Key Takeaways

- Structure = clarity + accuracy
- Stages reflect buyer commitments
- Sugar helps operationalize consistency
- Clean pipeline → better decisions
- Reps thrive with clear, simple process

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## Q&A

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## Upcoming Sessions

- Jan 6 – The Sales Pulse: Managing Through Activities
- Jan 13 – Sugar on the Go: Mobile Selling Made Easy
- Jan 20 – Less Busywork, More Selling – Automating Your Sugar Workflows

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## Opportunity Management Resources

- [Sugar Sell 25.2 Application Guide – Opportunity Management](#)
- [Help Articles for Opportunities and Forecasts](#)
- [SugarClub>Search of Opportunities](#)
- [Week 1: Recording \(Start Smart: The Power of Good Lead Qualification\)](#)

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