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Sugar Sell Foundations Webinar Series: Week 3
The Sales Pulse: Managing Through Activities
Webinar Fill-in the Blank Handout

✨ *Tip for attendees:* Don't overthink it—listen for keywords, patterns, and best practices!

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1. Why Activity Tracking Matters

Activities represent more than just tasks in Sugar.
They show _____, _____, and _____ in the sales process.
Tracking activities helps you:

- Show customer _____ _____
- Enable meaningful _____ _____
- Improve _____
- Prevent _____ _____
- Drive _____ _____

Without activity tracking, teams risk:

- No visibility into _____ effort
- Missed _____
- Inaccurate _____ assumptions
- Coaching becomes _____
- Deals _____ or _____

2. Sugar Activity Types: When to Use What

📞 **Calls**
Use Calls for:

- _____ conversations
- Call attempts or _____
- Scheduled or _____ calls

Key fields to remember:

- Direction
- _____
- Internal Notes
- _____

📅 **Meetings**
Meetings are best for:

- Scheduled _____
- Discovery _____
- Zoom / Teams calls
- Any interaction that requires a _____ and _____

Key fields:

- Repeat _____
- _____
- Internal Notes
- Guest

🗒 Notes

Notes are used for:

- **Information with no _____ date**
- **Important info that isn't a call or _____**

Key fields:

- **Description**
- **_____**

✅ Tasks

Use Tasks for:

- **_____**
- **To-dos that aren't calls or meetings**
- **Internal _____ or _____**

Key fields:

- **Start and End _____**
- **Status**
- **_____**
- **Description**

✉ Emails (Sugar Connect)

Sugar Connect allows you to:

- **Automatically capture _____ and _____ emails**
- **Link emails to _____, _____, _____, and _____**
- **Eliminate _____ data entry**

💬 Messages (SugarLive)

Messages represent:

- **Historical records of _____ conversations**
- **A transcript of the entire _____**

Key fields include:

- **Related _____**
- **_____ (participants)**
- **Conversation _____**

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3. Activity Tracking Best Practices

Decision guide:

Ask yourself: *"What actually happened—and what needs to happen next?"*

Tools that make tracking easier:

- **_____**
- **Quick _____**
- **Timeline _____**
- **Action _____**
- **Sugar Connect _____**
- **Last _____ field**
- **Calendar**

4. One-Click Activity Tracking

Action Buttons allow you to:

- **"_____ a Call"**
- **"Schedule _____"**

Benefits of Action Buttons:

- **_____**
- **_____**
- **_____**

5. Working in Sugar: Best Practices
✔ **Log activities in _____**

✔ **Use Quick Create for _____**

✔ **Review the _____ before reaching out**

✔ **Keep _____ and _____ fields updated**

6. Sugar Connect: Daily Workflow
A typical workflow:
1. **Receive email → _____ logged**
2. **Schedule discovery call → _____ synced**
3. **Hold call → log _____ outcome**
4. **Create _____ for follow-up**
5. **Manager reviews activity history in _____**

7. Dashboards, Reports & Coaching
Dashlets help reps see:
- **My _____**
- **Upcoming _____ & _____**
- **Recent _____**
- **Opportunities with no _____**

Managers use dashboards to track:
- **_____Gaps**
- **_____Activities**
- **Follow-up _____**
- **Activity _____**
- **Activity $\rightarrow$ _____ Movement**

8. Coaching with Activities
Activities help managers:
- **Review _____ in 1:1s**
- **Assess conversation _____**
- **Identify follow-up _____**
- **Spot skill _____**

9. Key Takeaways
✔ **Activities drive _____ and _____**

✔ **Calls, Meetings, Notes, Tasks, Email and Messages each serve _____ roles**

✔ **Sugar Connect reduces _____ work**

✔ **Action Buttons make tracking _____**

✔ **Dashboards and reports turn activity into _____ the process**

Notes: _____

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