sugarU

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!**

---

1. Why Activity Tracking Matters

Activities represent more than just tasks in Sugar.

They show **engagement, movement,** and **momentum** in the sales process.

Tracking activities helps you:

- Show customer **interaction history**
- Enable meaningful **coaching**
- Improve **forecasting accuracy**
- Prevent **follow-up gaps**
- Drive **deal progression**

Without activity tracking, teams risk:

- No visibility into **rep** effort
- Missed **follow-up**
- Inaccurate **pipeline** assumptions
- Coaching becomes **guesswork**
- Deals **slow** or **stall**

2. Sugar Activity Types: When to Use What

📞 Calls

Use Calls for:

- **Phone** conversations
- Call attempts or **voicemail**
- Scheduled or **completed** calls

Key fields to remember:

- Direction
- **Status**
- Internal Notes
- **Guest**

📅 Meetings

Meetings are best for:

- Scheduled **demos**
- Discovery **session**
- Zoom / Teams calls
- Any interaction that requires a **date** and **time**

Key fields:

- Repeat **Type**
- **Location**
- Internal Notes
- Guest

🗒️ Notes
Notes are used for:

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

Key fields:

- Description
- **Attachment**

✅ Tasks
Use Tasks for:

- **Follow-ups**
- To-dos that aren't calls or meetings
- Internal **reminder** or **to-do's**

Key fields:

- Start and End **Dates**
- Status
- **Priority**
- Description

✉️ Emails (Sugar Connect)
Sugar Connect allows you to:

- Automatically capture **inbound** and **outbound** emails
- Link emails to **leads, contacts, accounts,** and **opportunities**

Eliminate **manual** data entry

💬 Messages (SugarLive)
Messages represent:

- Historical records of **instant chat** conversations
- A transcript of the entire **messages**

Key fields include:

- Related **to**
- **Guest** (participants)
- Conversation **(transcript)**

3. Activity Tracking Best Practices
Decision guide:
Ask yourself: *"What actually happened—and what needs to happen next?"*
Tools that make tracking easier:

- **Subpanels**
- Quick **Create**
- Timeline **View**
- Action **Buttons**
- Sugar Connect **syncing**
- Last **Interaction** field
- Calendar

4. One-Click Activity Tracking
Action Buttons allow you to:

- **"Log** a Call"
- "Schedule **Follow-up**"

Benefits of Action Buttons:

- **Fast**
- **Consistent**
- **Accurate**

5. Working in Sugar: Best Practices
✓ Log activities in **subpanels**
✓ Use Quick Create for **speed**

✓ Review the **timelines** before reaching out
✓ Keep **outcomes** and **purpose** fields updated

6. Sugar Connect: Daily Workflow

A typical workflow:

1. Receive email → **auto-** logged
2. Schedule discovery call → **meeting** synced
3. Hold call → log **call** outcome
4. Create **task** for follow-up
5. Manager reviews activity history in **dashboard**

7. Dashboards, Reports & Coaching

Dashlets help reps see:

- My **Activities**
- Upcoming **Meetings** & **Calls**
- Recent **Communication**
- Opportunities with no **Next Steps**

Managers use dashboards to track:

- **Activity** Gaps
- **Aging** Activities
- Follow-up **Discipline**
- Activity **Balance**
- Activity → **Pipeline** Movement

8. Coaching with Activities

Activities help managers:

- Review **patterns** in 1:1s
- Assess conversation **follow-up**
- Identify follow-up **disciple**
- Spot skill **gaps**

9. Key Takeaways

✓ Activities drive **visibility** and **accountability**
✓ Calls, Meetings, Notes, Tasks, Email and Messages each serve **distinct** roles
✓ Sugar Connect reduces **manual** work
✓ Action Buttons make tracking **effortless**
✓ Dashboards and reports turn activity into **operationalize** the process

Notes: