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Sugar Sell Foundations Webinar Series: Week 4

Sugar on the Go: Mobile Selling Made Easy

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Why Mobile CRM Matters

Selling doesn't stop when you leave your desk—and neither should your CRM. Mobile CRM helps sales teams stay responsive, informed, and effective wherever they are.

Key benefits:
- Capture updates while **information** is still fresh
- Reduce lost context and **missed** follow-ups
- Improve **pipeline** accuracy and forecasting
- Stay **connected** between meetings and on the road

Where Sugar Mobile Fits

Sugar Mobile is **not a replacement for desktop CRM**. It is designed for:
- **Speed** and quick actions
- **Real-time** visibility
- Supporting selling moments that happen **away** from a computer

Use Sugar Mobile alongside desktop and tablet experiences for maximum **impact**.

Getting Started with Sugar Mobile

Sugar Mobile is a **native** mobile app that allows you to securely access your Sugar instance from your phone or tablet.

With Sugar Mobile, you can:
- View and **update** accounts, contacts, and opportunities
- Log calls, meetings, notes, and tasks
- Initiate phone calls, emails, and SMS
- Review **recent** activity and key details
- Prepare for meetings on the **go**

Access & Security

- Log in using the same **credentials** as desktop
- Same **permissions** and data visibility as Sugar desktop
- Available on **phones** and **tablets**

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Working Smart on a Small Screen

Mobile CRM works best when you focus on high-value, quick actions.

Best actions for mobile:

- Viewing account and contact details
- Checking opportunity **status** and **next steps**
- Logging calls, meetings, and notes
- Capturing insights immediately after interactions

Tips for efficiency:

- Use recent records and favorites
- Take advantage of global search and **saved searches**
- Keep notes concise and **actionable**

Mobile vs. Desktop: Choosing the Right Tool

Use Sugar Mobile for:

- Real-time updates **after** meetings
- Call notes and activity **logging**
- Quick **visibility** into accounts and opportunities

Use Desktop or Tablet for:

- Detailed analysis and **reporting**
- Complex **opportunity** updates
- Deep **pipeline** reviews

Best practice: Start updates on mobile, finish deeper work on **desktop**.

Supporting Leadership & Run the Business (RTB)

Consistent mobile updates improve visibility across the organization.

How Sugar Mobile supports leadership:

- On-the-go **pipeline** visibility
- Faster access to real-time **data**
- Improved **forecasting** accuracy
- Better **preparation** for meetings and check-ins

Mobile usage helps maintain a strong operational rhythm and supports confident decision-making.

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Real-World Mobile Selling Use Cases

Between meetings:

- Check account **status**
- Review **open** opportunities
- Prepare for the next **conversation**

Immediately after meetings:

- Log call notes while details are **fresh**
- Update opportunity stages
- Record **next steps**

Before leaving the parking lot:

- Capture key **updates** in under two minutes
- Keep CRM current without end-of-day **admin** work

Small, consistent actions lead to cleaner data, better forecasts, and faster deals.

Adoption Best Practices

- Start simple: focus on 2–3 **core** mobile actions
- Build **habits** around "update as you go" moments
- Set clear **expectations** for mobile usage
- Lead by example

Common pitfalls to avoid:

- Trying to do everything on mobile
- Waiting too long to update CRM
- Overloading mobile workflows

Key Takeaways

- Mobile CRM keeps selling moving **anywhere**
- Sugar Mobile is about **speed**, **focus**, and **visibility**
- Mobile + desktop **together** deliver the best experience

Next steps:

1. Open or **download** Sugar Mobile
2. Identify your top mobile use **cases**
3. Start capturing **updates** in real time

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Additional Resources

SugarCRM Mobile App User Guide
Offline Functionality
Administration Guide> Mobile Settings
Administration Guide> Studio> Mobile Layouts

Upcoming Webinars in the Series:
Jan 20: Less Busywork, More Selling – Automating Your Sugar Workflows

Jan 27: Sales Mastery: Driving Growth with Sugar

Feb 3: Seeing Success: Building Actionable Dashboards in Sugar

Thank you for attending **Sugar on the Go: Mobile Selling Made Easy**!