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Sugar Sell Foundations Webinar Series: Week 4
Sugar on the Go: Mobile Selling Made Easy
Webinar Fill-in the Blank Handout

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:

Bank of Answers:
Connected
Missed
Pipeline
Information
Real-time
Impact
Speed
Away

- Capture updates while _____ is still fresh
- Reduce lost context and _____ follow-ups
- Improve _____accuracy and forecasting
- Stay _____ between meetings and on the road

Where Sugar Mobile Fits

Sugar Mobile is **not a replacement for desktop CRM**. It is designed for:
- _____ and quick actions
- _____ visibility
- Supporting selling moments that happen_____ from a computer

Use Sugar Mobile alongside desktop and tablet experiences for maximum _____.

Getting Started with Sugar Mobile

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

Bank of Answers:
Update
Go
Update
Permissions
Tablet
Credentials
Phone
Native
Recent

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

Access & Security

- Log in using the same _____ as desktop
- Same_____ and data visibility as Sugar desktop
- Available on _____ and _____

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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 _____ and _____ _____
- Logging calls, meetings, and notes
- Capturing insights immediately after interactions

Tips for efficiency:

- Use recent records and favorites
- Take advantage of global search and _____ _____
- Keep notes concise and _____

Bank of Answers:

Saved Searches

Status

Actionable

Next Steps

Mobile vs. Desktop: Choosing the Right Tool

Use Sugar Mobile for:

- Real-time updates _____ meetings
- Call notes and activity _____
- Quick _____ into accounts and opportunities

Use Desktop or Tablet for:

- Detailed analysis and _____
- Complex _____ updates
- Deep _____ reviews

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

Bank of Answers:
Desktop

After

Visibility

Pipeline

Reporting

Opportunity

Logging

Supporting Leadership & Run the Business (RTB)

Consistent mobile updates improve visibility across the organization.

How Sugar Mobile supports leadership:

- On-the-go _____ visibility
- Faster access to real-time _____
- Improved _____ accuracy
- Better _____for meetings and check-ins

Bank of Answers:
Data

Pipeline

preparation

Forecasting

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 _____
- Review _____ opportunities
- Prepare for the next _____

Immediately after meetings:

- Log call notes while details are _____
- Update opportunity stages
- Record _____ _____

Before leaving the parking lot:

- Capture key _____ in under two minutes
- Keep CRM current without end-of-day _____ work

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

Bank of Answers:

Fresh

Admin

Open

Conversation

Updates

Next Steps

Status

Adoption Best Practices

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

Bank of Answers:

Expectations

Core

Habits

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 _____
- Sugar Mobile is about _____, _____, and _____
- Mobile + desktop _____ deliver the best experience

Bank of Answers:

Anywhere

Speed focus

visibility

Together

Download

Cases

Updates

Next steps:

1. Open or _____ Sugar Mobile
2. Identify your top mobile use _____
3. Start capturing _____ 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**!