



# Turbocharging Manufacturing Success with Sugar Sell

Streamline Sales, Strengthen Operations, and Sell Smarter

---

August 2025

Andrea Ayers, Sr. Product Trainer & Instructional Designer

# Purpose of the Webinar

Show manufacturing teams how to unlock new levels of efficiency and growth with Sugar Sell.

- Demonstrate how to streamline sales processes for faster results.
- Highlight ways to connect operations more seamlessly across the organization.
- Empower teams to sell smarter in today's competitive market.



# Housekeeping

- ✅ The session is being recorded — you'll receive the link after the webinar.
- 💬 Use Chat at anytime to add your questions.
- 🙋 We'll save time at the end for live Q&A.
- 📄 Slides and resources will be shared with attendees after the session on SugarClub.
- 🔕 Muted for clear recording and avoid background noise.



# Agenda:

Welcome

The Manufacturing Sales Challenge

Streamlines Key Stages in the Manufacturing Sales Cycle

Achieve 360° Visibility Across Relationships

Leverage Automation & Insight

Connect Sales to Production & Fulfillment

Customer Success Story

Q&A + Wrap-Up



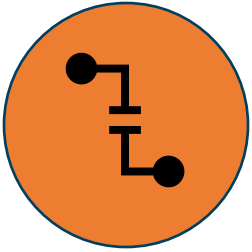
## Poll Question:

What's your biggest challenge in the sales process today?

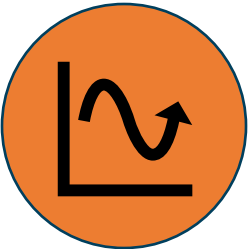
# Manufacturing Sales Challenge

What's Slowing Down Your Lead-to-Order Process?

# Overview of Common Manufacturing Pain Points



- Disconnected Systems
  - Relies on a patchwork of legacy systems
  - Creates barriers to collaboration
  - Resulting in duplication



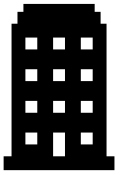
- Long Lead-to-Order Cycles
  - Complex product configurations
  - Struggles to respond quickly
  - Leads to missed opportunities and customer frustration



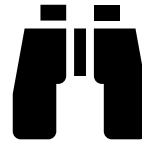
- Limited Visibility Across Departments
  - Difficulty tracks deal
  - Lacks real-time insights
  - Managers are left without data



# How Sugar Sell Is Purpose-Built for Manufacturing



Sugar Sell Designed  
with Manufacturing  
Organizations



Unified Platform that  
connects your data,  
simplifies processes,  
and offers visibility



Transforms pain  
points into  
opportunities



# Streamlines Key Stages in the Manufacturing Sales Cycle

From First Contact to Final Delivery — Faster, Smarter, and Seamlessly Connected

# Lead Qualification

Identify high-quality leads using built-in scoring, activity tracking, and AI-powered insights



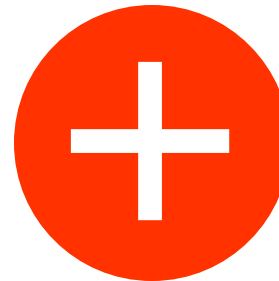
Surfaces the most promising opportunities-based behaviors



Automate lead routing based on specific criteria to ensuring reps engage the right leads at the right time



Generate, capture and qualify leads in real-time

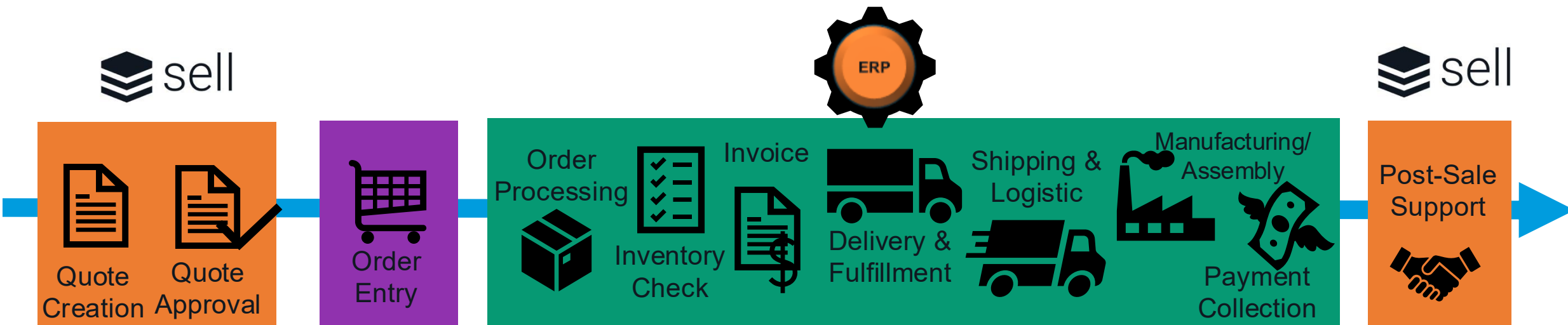


# Quote Configuration

Manufacturing quotes often involve configurable products, pricing tiers, and volume discounts



# Order Management Handoff



# Tailoring Workflows to Reflect Manufacturing Specific Sales Processes

- Flexible workflow engine allows you model your exact sales process
- Create Rules for ...
  - Stage progression,
  - Automate task creation, or
  - Build Custom Alert.
- Adapts to your process, not the other way around

By streamlining the lead-to-order process, Sugar Sell helps manufacturers shorten sales cycles, improve quote accuracy, and enhance internal collaboration—all while delivering a better experience for your buyers.





# Achieve 360° Visibility Across Relationships

Unifying Data to See Every Connection, Every Opportunity

# Show Customer, Distributor, and Partner Relationship Tracking

Supports Account Hierarchies & Relationship Mapping

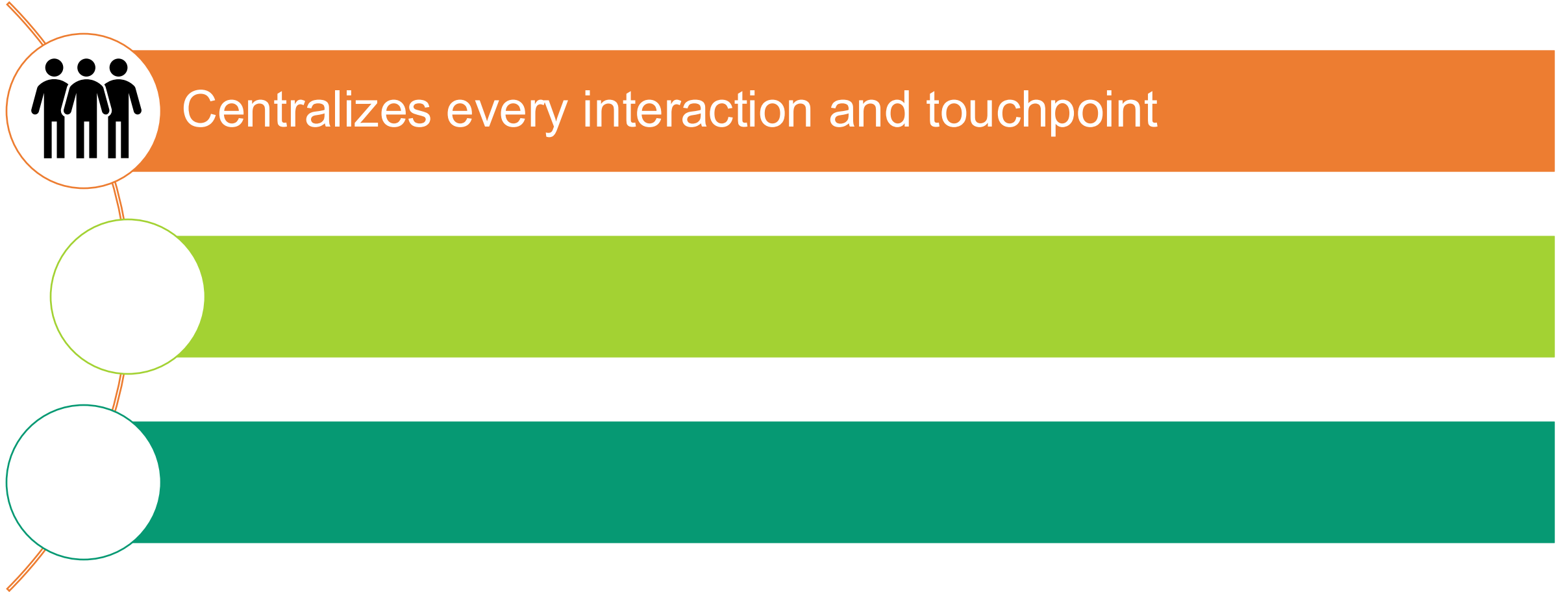
Associate Multiple Contacts, Roles, & Partner Accounts with each deal

Understand key decision-makers, channel involved, and customers connected to your partner ecosystem

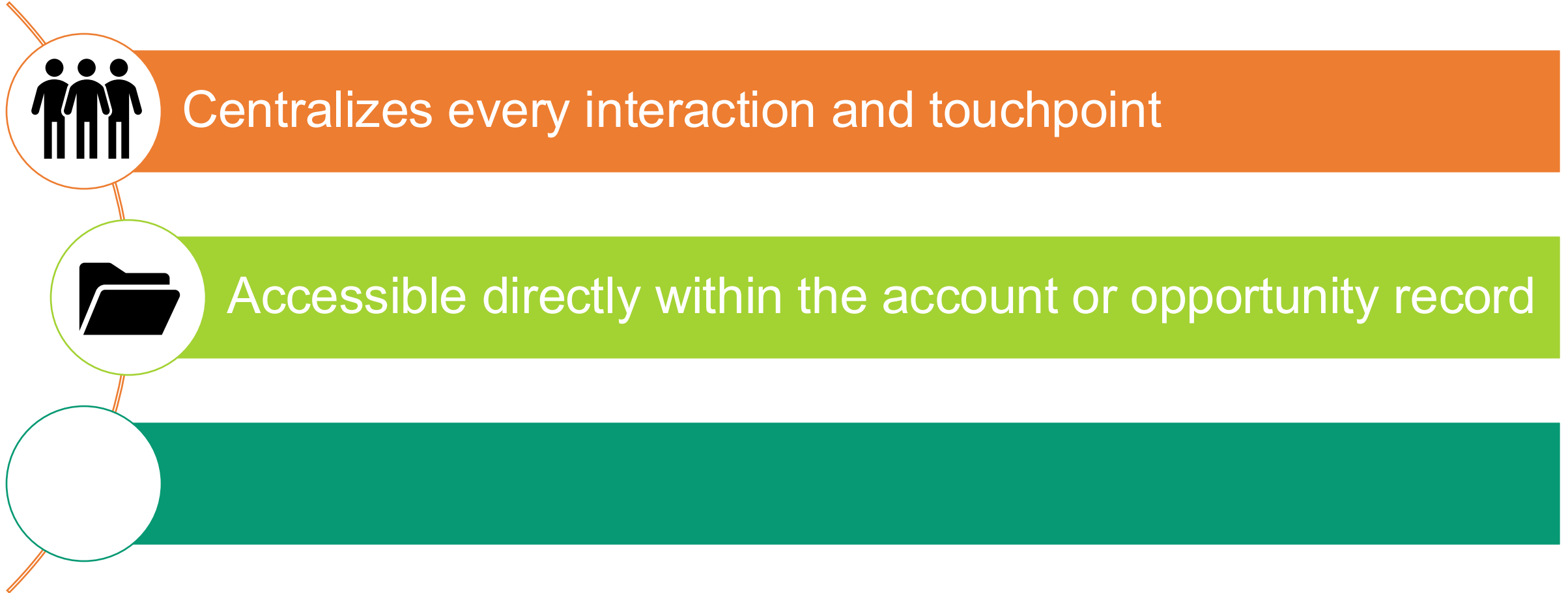
View Historical Relationship – Useful in long-term cycles or repeat business scenarios

# Centralized Data on Accounts, Activity History, Support Cases, and More

# Centralized Data on Accounts, Activity History, Support Cases, and More



# Centralized Data on Accounts, Activity History, Support Cases, and More



# Centralized Data on Accounts, Activity History, Support Cases, and More



Centralizes every interaction and touchpoint



Accessible directly within the account or opportunity record



Custom modules can be added



# Use Case: How Sales Reps & Operations Benefit from Complete Data Context

- **For Sales Reps:**
  - Before a call
  - Informed Conversations
  - Example: rep notices opened support cases

# Use Case: How Sales Reps & Operations Benefit from Complete Data Context

- **For Sales Reps:**

- Before a call
- Informed Conversations
- Example: rep notices opened support cases

- **For Operations Teams:**

- Operations: Can access to sales insights, they can better forecast production needs and align logistics.
- Support teams: Can proactively assist customers based on deal stage or account tier.

**Example:** Contract renewal nearing with unresolved issues

# Use Case Demo Option

- Walk through typical sales day looks like
- Distributor account.
  - See a recent escalation from support,
  - Quote – negotiation status quote – next step is for the order to be accepted by the internal production team
  - a note from the last meeting.
- This visibility helps you come to the table with empathy, strategy, and solutions—all in one view.

## **Poll Question:**

**Which feature or capability shown so far would bring the biggest impact to your team?**

With Sugar Sell, sales and service teams aren't just working *with* data—they're working *smarter* because of it. 360° visibility means faster decisions, better collaboration, and stronger relationships across the entire manufacturing value chain.



# Leverage Automation & Insight

Turning Insights into Action with Less Effort"



Uses AI to score  
leads &  
opportunities

Highlight Sugar's  
AI-Driven  
Insights (Sugar  
Predict)

Uses AI to score  
leads &  
opportunities

Instantly see  
which  
opportunities are  
likely to close

Highlight Sugar's  
AI-Driven  
Insights (Sugar  
Predict)

Uses AI to score  
leads &  
opportunities

Instantly see  
which  
opportunities are  
likely to close

Prioritize time  
and effort

Highlight Sugar's  
AI-Driven  
Insights (Sugar  
Predict)

Uses AI to score  
leads &  
opportunities

Instantly see  
which  
opportunities are  
likely to close

Prioritize time  
and effort

Helps Churn  
Risk Analysis &  
Forecast  
Accuracy

Highlight Sugar's  
AI-Driven  
Insights (Sugar  
Predict)

Uses AI to score  
leads &  
opportunities

Instantly see  
which  
opportunities are  
likely to close

Prioritize time  
and effort

Helps Churn  
Risk Analysis &  
Forecast  
Accuracy

Works out-of-  
the-box

Highlight Sugar's  
AI-Driven  
Insights (Sugar  
Predict)

# Real-World Automation Examples

- Sugar's advanced workflow engine (SugarBPM) lets you automate repetitive, error-prone tasks.
  - Follow-Up Reminders
- Automatically create tasks or send reminders if no contact is made within a set timeframe after a quote is sent or a meeting occurs.
  - Quote Approvals
- Route quotes over a certain value or with special discounts to a manager or finance for approval—no more manual email chains.
  - Task Routing
- Assign tasks or leads based on region, product line, or rep capacity—ensuring the right person always gets the right work.
  - Lead Routing



# Dashboards & Reports That Enable Proactive Selling

- Dashboards surface pipeline health, top accounts, stalled deals, and team performance at a glance.
- Custom reports can be created for forecasting by product line, territory, or rep.
- Teams can track KPIs like lead response time, quote turnaround, and sales velocity to identify bottlenecks early.
- All dashboards are real-time and shareable—perfect for 1:1 coaching or team-wide alignment.

# Connect Sales to Production & Fulfillment

Keeping Sales, Operations, and Customers in Perfect Sync

# Bringing CRM Together with ERP/MRP Systems



Integrates with  
Leading ERP and  
MRP platforms

# Bringing CRM Together with ERP/MRP Systems



Integrates with  
Leading ERP and  
MRP platforms



Sales Teams Visibility  
into Inventory Levels,  
Production Schedules,  
and Delivery Timelines

# Bringing CRM Together with ERP/MRP Systems



Integrates with  
Leading ERP and  
MRP platforms

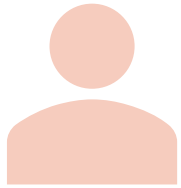


Sales Teams Visibility  
into Inventory Levels,  
Production Schedules,  
and Delivery Timelines



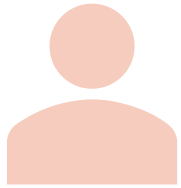
Enables automated  
order creation and  
Tracking

# Inventory Visibility, Production Timelines, & Delivery Forecasting



Reps: Products in stock or in production

# Inventory Visibility, Production Timelines, & Delivery Forecasting

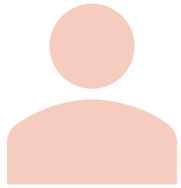


Reps: Products in stock or in production

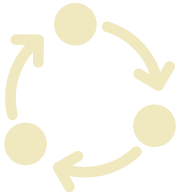


Operations: Can Better Plan Workloads

# Inventory Visibility, Production Timelines, & Delivery Forecasting



Reps: Products in stock or in production



Operations: Can Better Plan Workloads



Make-to-Order Business: Level of Supports  
Realistic Quoting and Capacity Management



# Customer Success Story

# Manufacturing Customers' Success Story



Design and Build  
Innovative Energy  
Control Solutions for  
Aerospace and more



Australia's Largest RV  
Manufacturer



Leading  
Manufacturing of Self-  
Adhesive Materials,  
Papers and Films  
Designed Specially for  
Labeling

# Manufacturing Customers' Success Story



Design and Build  
Innovative Energy  
Control Solutions for  
Aerospace and more



Australia's Largest RV  
Manufacturer



Leading  
Manufacturing of Self-  
Adhesive Materials,  
Papers and Films  
Designed Specially for  
Labeling

# Manufacturing Customers' Success Story



Design and Build  
Innovative Energy  
Control Solutions for  
Aerospace and more



Australia's Largest RV  
Manufacturer



Leading  
Manufacturing of Self-  
Adhesive Materials,  
Papers and Films  
Designed Specially for  
Labeling

# Q&A and Wrap-up

# Open the Floor for Audience Questions





# Key Takeaways

- Sugar Sell is built for manufacturers—supporting complex processes with automation, insight, and connectivity.
- It enables teams to move from reactive selling to proactive, informed sales execution.
- The result? Shorter cycles, stronger customer relationships, and improved margins.

# Next Steps

- [Downloadable Case Studies from our Customers](#)
- [Watch CRM + ERP Integration for Manufacturing video](#)
- “Let’s Keep the Conversation Going” – [SugarClub Engagement with Manufacturing & Distribution Group](#)
- [How to Use Sugar Sell](#) self-paced course (free)
- [Request a Tailored Demo](#) of any of the features you heard about today
- Fuel Your Customer Experience with free [resources](#) (Guides, Infographics, podcast, video webinars, and whitepapers)
- Blog Post: [Five Main Benefits of Integrating Your ERP and CRM Solutions](#)





Thanks for attending.