



SugarU Live Webinar Series: Optimizing Sales Team Management in Sugar Sell for Manufacturing

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Andrea Ayers, Sr. Product Trainer & Instructional Designer

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Introductions

Andrea Ayers
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✕ #SugarCRMu
university.sugarcrm.com



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Agenda

- Introduction & Challenges
- Key Capabilities in Sugar Sell
- Demo Walkthrough
- Best Practices
- Q&A and Closing

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Challenges

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Manufacturing Sales Challenges



Longer
sales
cycles



Multiple
stakeholders

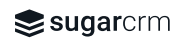


Complex
products



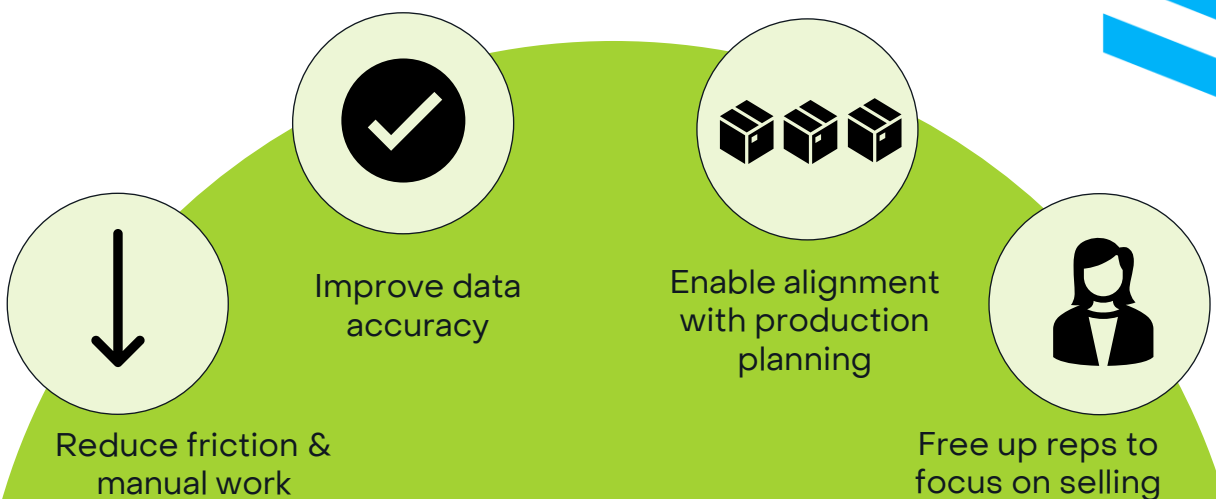
Misalignment
with production
and inventory

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Why Optimize Sales Operations



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Four Steps to Make SugarCRM Work Better

☒ Define your sales processes

☐
☐
☐


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Four Steps to Make SugarCRM Work Better

☒ Define your sales processes

☒ Configure lead assignment & territories

☐
☐


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Four Steps to Make SugarCRM Work Better

- ☒ Define your sales processes
- ☒ Configure lead assignment & territories
- ☒ Clarify sales cycles & stages
- ☐



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Four Steps to Make SugarCRM Work Better

- ☒ Define your sales processes
- ☒ Configure lead assignment & territories
- ☒ Clarify sales cycles & stages
- ☒ Set quotas & KPIs



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How Sugar Sell Enhances Sales Ops

AI-powered
insights – Sugar
Predict

No-code
configurations

Workflow
automation –
SugarBPM

Seamless
integrations

Lead &
opportunity
management

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Key Capabilities in Sugar Sell

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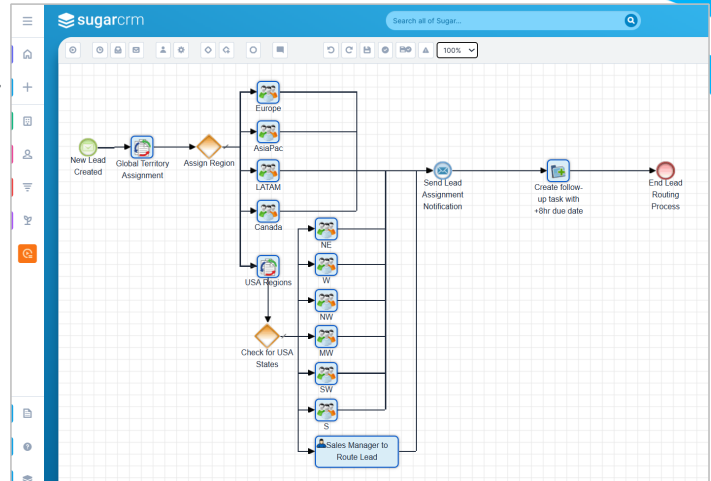


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Key Features: Territory & Team Management

- Define territories (geo, product, segment)
- Assign leads automatically
- Manage overlapping territories with roles

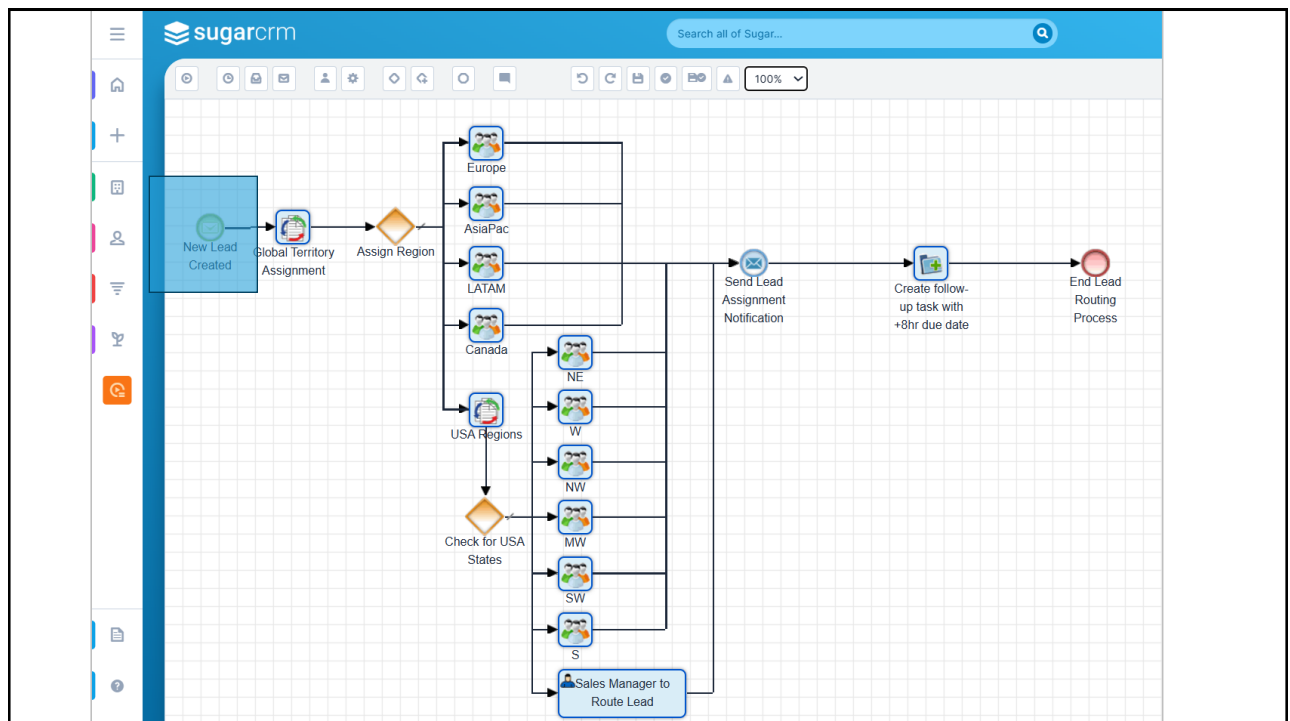
Route Lead and Create Follow-Up Task



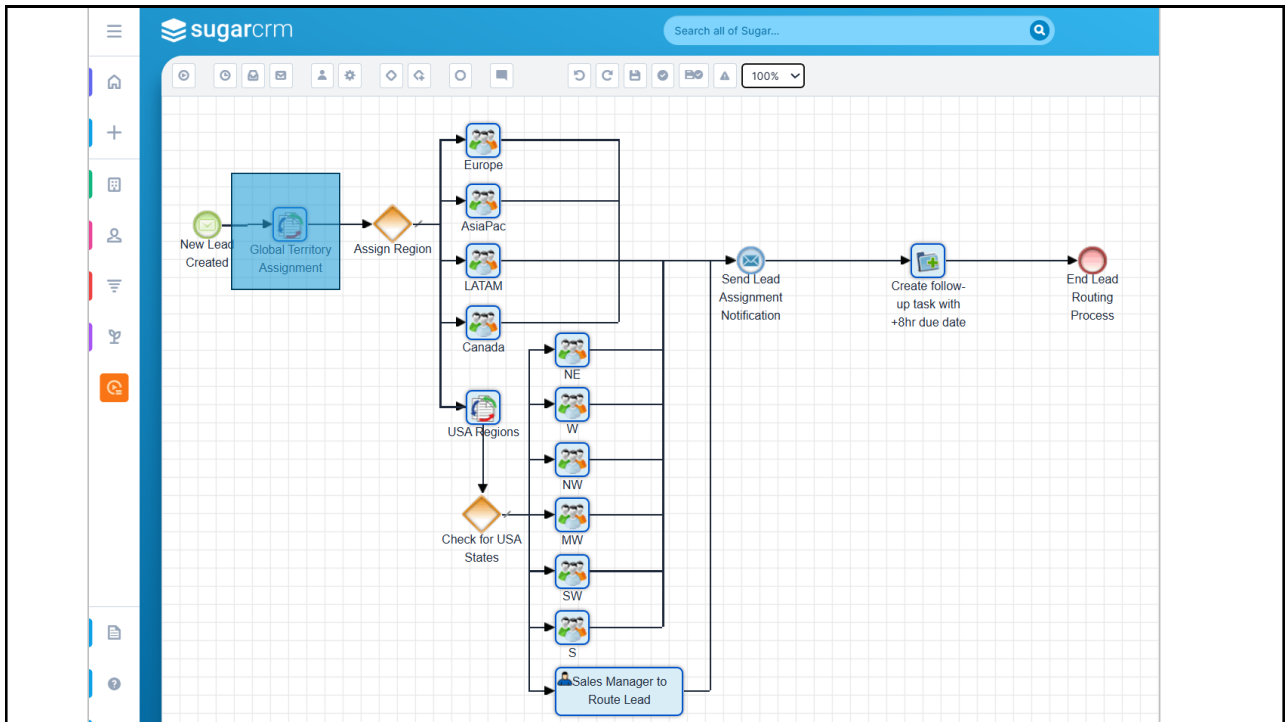
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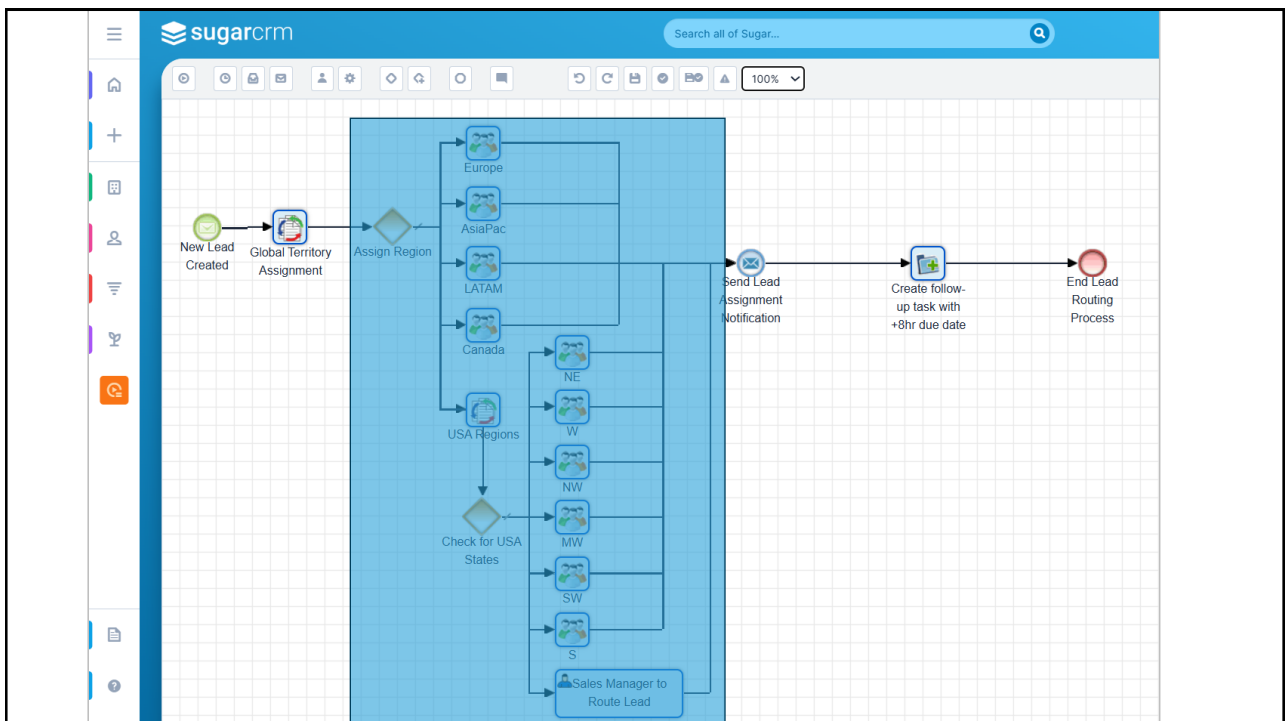
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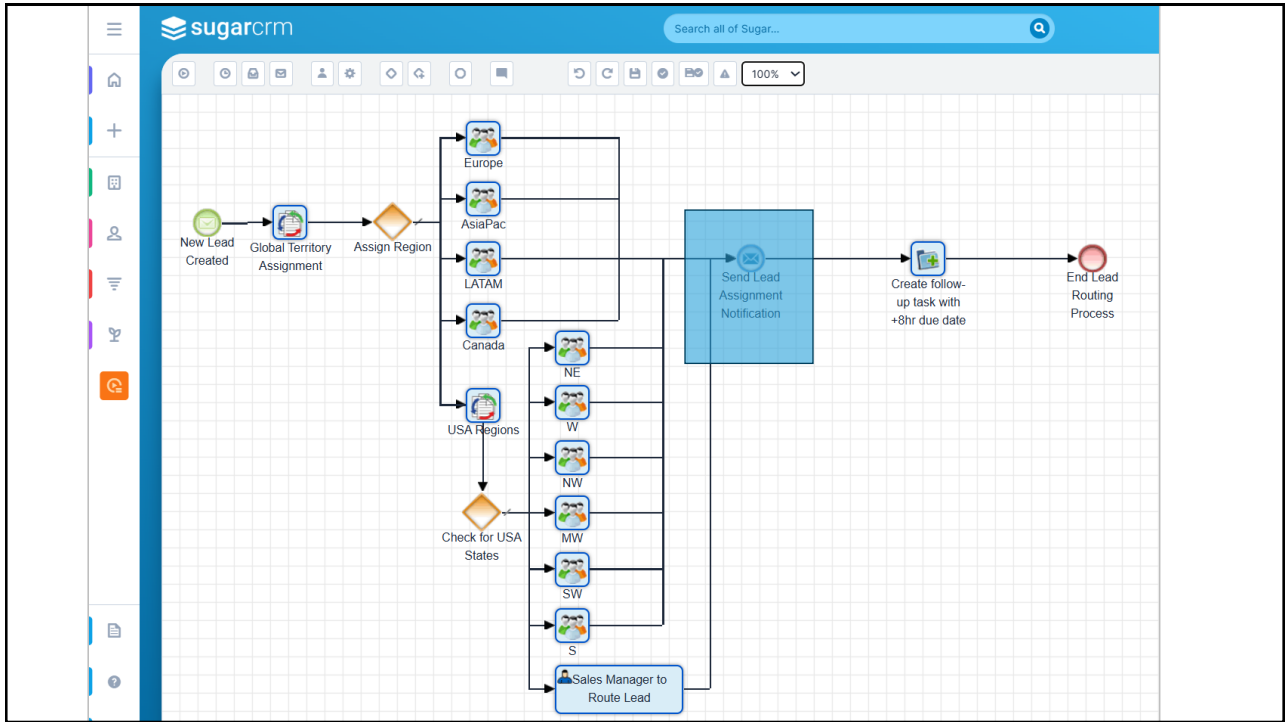
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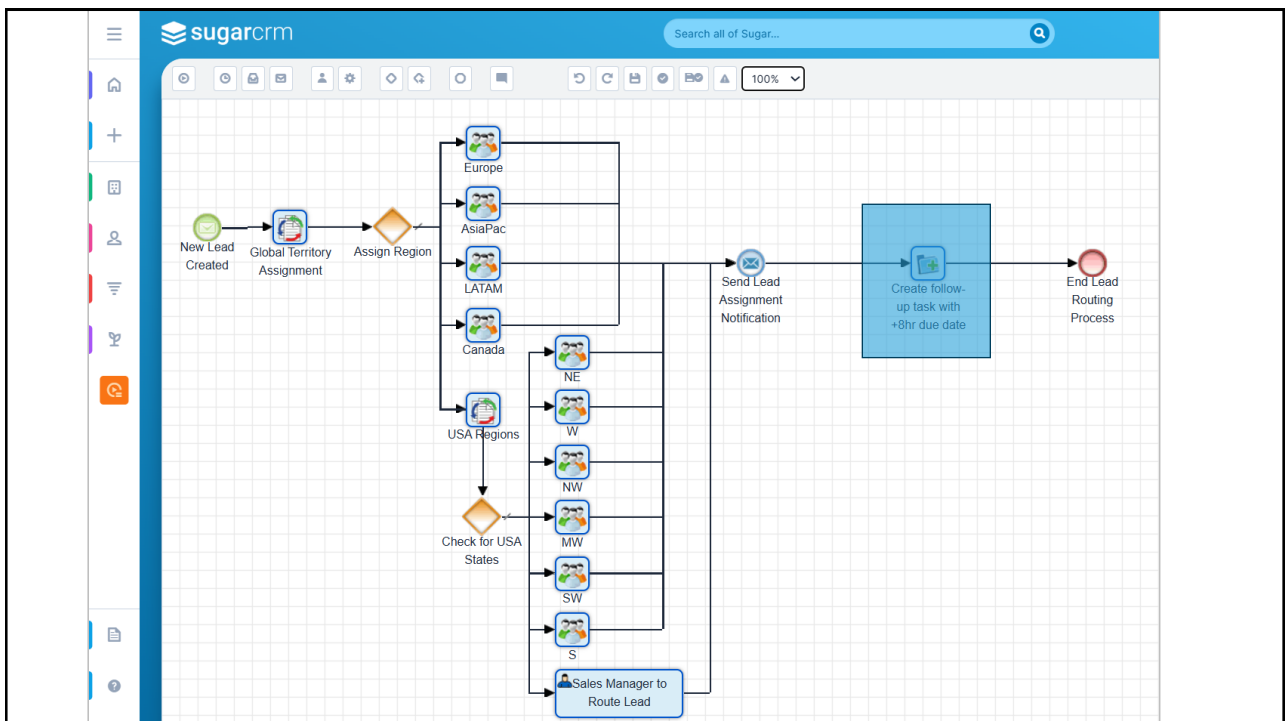
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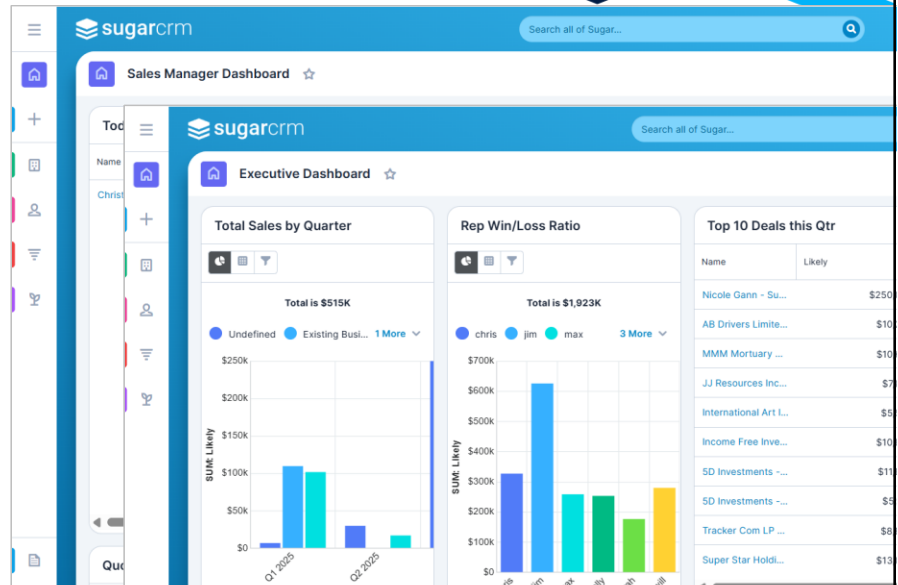
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Key Features: Dashboards & Reporting

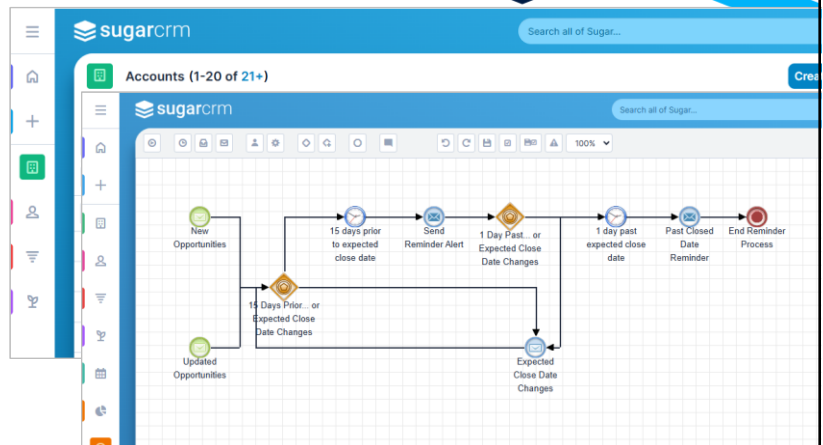
- Role-based dashboards
- Real-time updates
- Custom and exportable reports



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Key Features: Automation & Notifications

- Automated follow-ups & reminders
- Approvals and stalled-deal alerts
- Dynamic workflows adjusting to stage changes



Stagnant Opportunity Reminder

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Key Features: Integration & Extensibility

- Open APIs & connectors
- ERP & inventory integration
- Multi-entity management

Resources:

[System - Connectors](#)

[Integrating With Microsoft for Admins](#)

[Integrating With Google for Admins](#)

[Configure API Platform](#)

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Demonstration

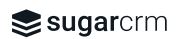
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Best Practices & Tips

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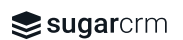
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Best Practices & Tips



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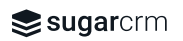
- Document and revisit processes
- Focus on data hygiene
- Start small with workflows and iterate
- Engage reps early with training



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Q & A

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Summary & Next Steps

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The screenshot shows the SugarClub website interface. The top navigation bar includes links for DevClub, PartnerClub, Support, Marketplace, and SugarCRM. A search bar is prominently displayed. Below the navigation bar, a "Welcome to sugarclub" banner is visible. The main content area features several promotional tiles, including "Sales Intelligence Add-on for Enterprise", "sales-i Group", "Why Training Matters", and "SugarU Live Webinar". A "News from Across SugarClub" section lists updates for Sugar Sell, Sugar Serve, and Sugar Enterprise. A "Who's Online Right Now?" section lists several users. To the right of the website screenshot, an illustration shows a woman with grey hair, wearing a green sweater and dark pants, pointing at a presentation screen. The screen displays a slide with the number "1" and a "Next" button. The SugarCRM logo is visible in the bottom right corner of the illustration.

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The slide features a green background with a white SugarCRM logo in the top left corner. The main text, in white, reads: "SugarU Live Webinar Series: Optimizing Sales Team Management in Sugar Sell for Manufacturing". Below this text, a horizontal line is present. At the bottom of the slide, the text "Thanks for attending today's webinar." is displayed in white.

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