

Automate, Accelerate, and Unify CRM Processes and Best Practices

Automate repetitive tasks and take the guesswork out of multistep processes, so your front-line employees can focus more on your customers. With Automate, you can ensure employees follow best practices with highly interactive process guides, making it easier to consistently execute sales plays, follow sales methodologies, resolve service cases, nurture leads, and more. Now you can more easily bridge the gap between sales, marketing, and services processes, all without writing a single line of code!

More Time for Your Customers

Enable your employees to give customers positive experiences more consistently with custom playbooks that align with your best practices. Automate allows you to intuitively design, visualize, and implement interactive marketing, sales, and service processes that help reduce performance variability and increase focus on customer needs.

Win with Speed

Accelerate your business growth with shorter sales cycles, faster response times, and quicker problem resolution so teams can spend their time selling and helping customers. Operationalize performance excellence with proven sales methodologies, case management procedures, customer onboarding processes, and prospect nurturing and routing activities.

Apply Best Practices

Automate's powerful rules engine drives "what happens next," allowing you to monitor activities and take prescriptive action when critical thresholds or conditions occur. Automate includes embedded analytics, which provides real-time visibility into tracking the progress and outcomes of defined processes.

sugar automate

Automate Customer-Facing Business Processes ///

Construct easily repeatable workflows, so your teams can eliminate busy work and focus on what matters.

Accelerate Sales Cycles and Service Workflows ///

Increases efficiencies by eliminating up to 90% of the clicks to complete repetitive tasks.

Drive Operational Excellence with Self-Guided Best Practices ///

Drive operational excellence with guided selling and best practices to consistently deliver optimal experiences.

Popular Use Cases

Organizations use Automate to streamline business processes and ensure key strategies align with best practices across marketing, sales, and service teams.

Sales

- Standardize sellers on popular sales methodologies (e.g., SPIN Selling, MEDDIC, etc.), or implement one of your own.
- Guide sellers through manual tasks or sales plays with visual steps to take next.
- Ensure all exception requests stay compliant with company policies and are routed to the right place for review.
- Capture every renewal by connecting Automate with Sugar's Renewals Console to process contracts and payment terms.

Marketing

- Develop and activate new customer marketing activities, campaigns, and nurture processes.
- Establish marketing processes for monitoring and maintaining relationships from prospect to customer.
- Coordinate sales and marketing programs by automatically sharing information effortlessly between teams.
- Improve conversions by guiding sellers through lead nurturing and routing guidelines.

Customer Service and Support

- Help service teams automate case management, tracking, and managing customer requests.
- Guide service reps through repetitive tasks and reinforce best practices, ensuring all customers get the best service possible.
- Define escalation paths and requirements, so your teams can avoid costly exceptions.
- Decrease onboarding time for new customers to become successful in using your solutions.

Capabilities

No-Code Toolset

Automate enables administrators to create easy-to-follow, visual business processes for users to complete against their Sugar records with a powerful and intuitive template builder. Within minutes, admins can define an end-to-end process and split those processes into color-coded stages with no code required.

Performance Monitoring

Accelerate efficiencies by monitoring in real-time all your defined processes with embedded analytics. Use insights from reports to track the progress of each task and make data-driven decisions on how you optimize and simplify those processes over time.

Connectivity with BPM

Use Automate to trigger complex workflows across the front and back-office with Sugar's Business Process Management tools, or use those tools to kick off a pre-defined template with assigned users and next actions. These combined tools help accelerate response times and drive customer satisfaction ratings.

About SugarCRM

SugarCRM is how marketing, sales, and service teams finally get a clear picture of each customer to help businesses reach new levels of performance and predictability. Sugar is the CRM platform that makes the hard things easier.

Thousands of companies in over 120 countries rely on Sugar to achieve high-definition CX by letting the platform do the work. Headquartered in Silicon Valley, Sugar is backed by Accel-KKR.

To learn more visit www.sugarcrm.com or follow @SugarCRM.