

Podcast Script – The Technical Downside of 10% -> Closed

Welcome to this sixty second Sugar snippet. My name is Susie Williams. Today we're going to expand on a topic that we introduced last week: the act of moving the probability of closing a sales opportunity from 10% straight to Closed. This time we will focus on the software or technical reasons why you don't want to jump from Start to Finish without passing through each sales stage.

If you have taken advantage of one of the more powerful “bells and whistles” of the Professional and Enterprise editions of SugarCRM, you have set up workflows that happen when an Opportunity record is saved. Workflows let you create a task for another person when your opportunity reaches a particular stage, for example. So if your Opportunity reaches the Contracting stage, you can create a task for the legal team to review the terms of the contract before it's sent to the customer for signature.

Using workflows, you can guide sales reps to follow the same proven sales process every time, and you can ensure that no steps are omitted.

Well, if you jump past all the sales stages in that rush to get to the Closed stage, you omit the Workflow logic and none of those great workflow events happen. That task for the legal team isn't created unless you remember to manually add it yourself. The burden falls on you to remember exactly what steps and tasks need to happen at every stage, instead of using the software tool to guide you.

This rationale can be applied to other areas of the application as well. In our Support module, it's tempting for a customer support agent to take a call, then open the case after hanging up the phone, filling in the information after the fact and saving the new case as “Closed”. Here at Sugar, we have business logic hooks and workflows that fire when the case is opened. If you create a case that starts with status Closed, the workflows don't fire. The better way to handle the case would be to open and save the initial case, then use the fields that are built into the tool to capture the details of the situation. You can type notes straight into the Notes field and save yourself some copy and paste work too.

And that's your sixty second Sugar snippet. Goodbye!