

## Podcast Script: Workflows

Welcome to this 60 second sugar snippet. My name is Susie Williams. Today we're going to talk about Workflows, one of the most powerful features of the Pro and Enterprise editions of SugarCRM.

A workflow is a term used to describe a set of tasks or steps for a business process. Though we often don't realize it, we all use workflows in our daily lives. Look at your shampoo bottle- "Lather Rinse Repeat." Another one that's more in line with a business environment is "send an alert to the IT person when a critical piece of hardware doesn't respond for 2 minutes." Then there's always my favorite marauding Viking workflow: "First you pillage, then you burn!"

Workflows are put in place primarily for two reasons: consistency and completeness. Consistency means all of your users follow the same process every time when some event happens. Completeness means that no steps are forgotten during the process.

To get your mind thinking about workflows you can include in your instance of Sugar, here are some examples of ones we have implemented in our own Sugar installation:

- When a customer's support case changes its status, notify the customer contact by sending an email alert that includes both the old and the new status
- If the Priority field on the support case is set to "P1", the highest priority, send an email alert to management
- Whenever a case is closed, notify the Knowledge Base author, who evaluates the resolution to see if there is material for a KB article

Other areas of Sugar can benefit from workflows as well. What about setting a task for the sales operations person to review the opportunity when it reaches the Contract stage, to ensure that all of the pieces are in place to close the deal smoothly?

You can also create time-based workflows that are invoked when something doesn't happen after a period of time. An example of this would be to send an alert to an employee when the status of a task hasn't changed for a week. Now I usually don't like to advocate outright nagging, so think of that workflow as a gentle reminder that something might need some attention.

To put workflows into practical use in your installation, take a look at the steps your Sugar users are doing on a regular basis. Map out your business processes, and find the ones that make sense to incorporate into your CRM system. Talk to your "power users" about what best practices they use to consistently win deals, then build the best processes into your Sugar application so all your users can follow these good ideas. Let the workflows do the work for you, and you'll have a better, more consistent, more repeatable process in the end.

And that's your 60 second Sugar snippet. Goodbye!