

KNOWLEDGE MANAGEMENT AS EASY AS ABC

Use Check List for Sugar to implement and share your corporate best practices



TABLE OF CONTENTS

- 3 4 steps to success
- 4 Enhanced user experience
- 5 Business gains
- 6 Conclusion

Any company is likely to face a number of problems when a new employee joins a team or when the common order of work changes. Both situations require effective knowledge sharing so as to ensure that best corporate practices are not lost and can be applied in the daily work. **This is where Check List for Sugar comes to the rescue.**



The work of Check Lists is based on 4 activities to be performed:

1 PLAN

At the first step, Check List enables you to define a number of tasks to be performed and prepare templates for further processing.

2 DO

After compiling Check List templates, you can start processing your Leads.

3 STUDY

Scrutinize the results of Lead processing simply by using a number of dashboards and reports, built automatically by the program.

4 ANALYZE

Use all the data received to examine the obtained results and see what can be improved in Check Lists to make Lead Management more effective.

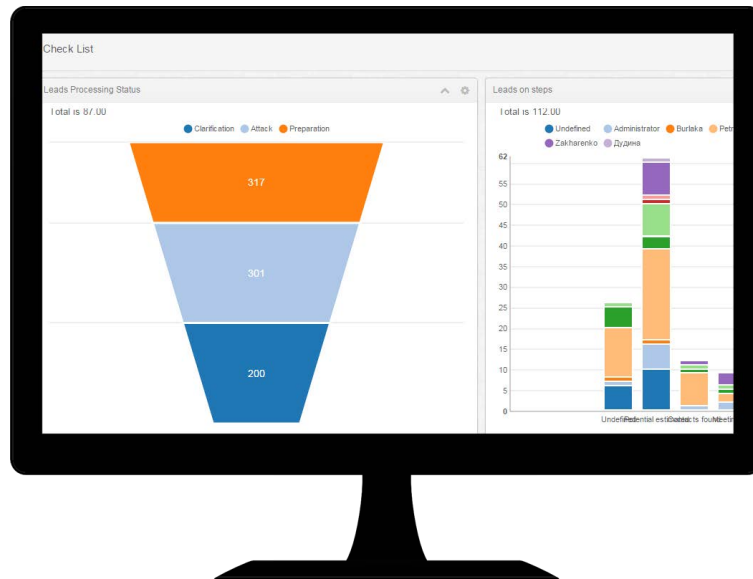
Documentation of best practices in Lead management by Lead types. Check List helps to define steps to be performed at each stage of Lead processing.

Enhancement of corporate best practices. With Check List, sales managers can add various comments and recommendations as to how Lead management could be optimized.

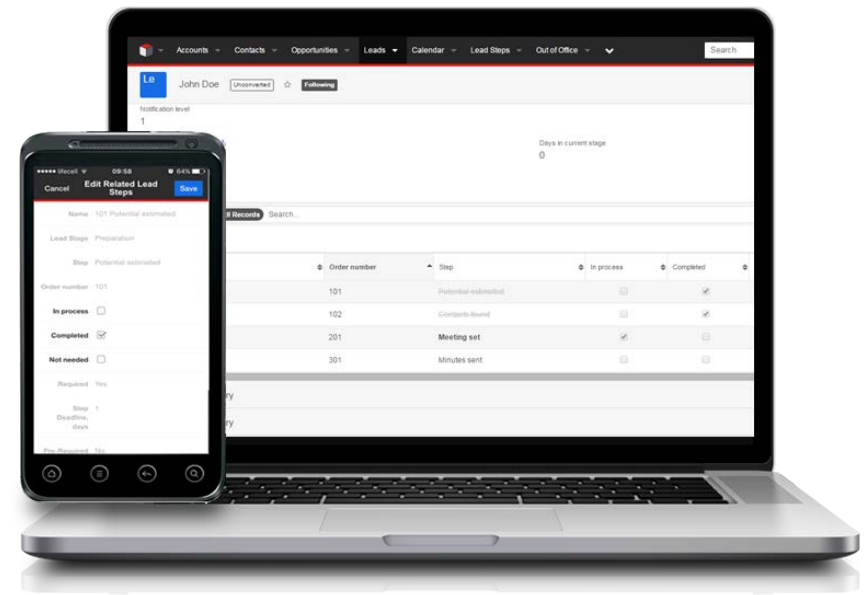
Less time spent on training. Senior managers will no longer have to spend hours on training juniors.

Simplified analysis of Lead management. Check List helps to identify stages of Lead processing.

Independence from daily status meetings. The management gets full information on Lead processing in the convenient form of dashlets and reports.



Try user-friendly reports and dashboards to understand your data better



Enjoy the benefits of Check List on various mobile devices

Flexibility. With less time spent on sharing best practices with new employees, your company will be more adaptable to changing working conditions.

Better customer experience. With advanced best practices management and sharing, your company will be able to ensure that all customers' tasks and problems are solved accurately and timely.

Increased sales productivity. Check List will ensure timely reminders about pending Leads and send prompts on how to perform a certain step.

Quicker improvement of processes. With Check List, all issues in Lead management will be right before your eyes.

Cost- and time-efficiency at the heart. Check List will optimize employee training without the need to spend a fortune on it.

More realistic reporting. Having analyzed the information received from Check Lists, you will be able to build reports more accurately.



One who owns the information, owns the world. An undeniable fact that we all know. However, when it comes to best practices in business, owning massive data will not suffice. Sharing is the key. Though sometimes viewed as time-consuming, knowledge sharing and managing is indispensable in any successful company. That is why Integros developed Check List. With its help, you will be able to optimize day-to-day organizational processes, ensure effective sharing of corporate best practices, find and remove bottlenecks in lead management, and make your work way more efficient.

Yet, most importantly, Check List will be helpful for anyone working with Sugar, from ordinary sales representatives to team leads and even the CEO. This is achieved thanks to its extended functionality and the number of features designed to solve the most frequently emerging issues.

USE CHECK LIST AND MAKE YOUR LIFE EASIER

