



Streamlining Manufacturing Workflows with SugarBPM


Common Processes & Best Practices

PRESENTER
Andrea Ayers, Sr. Product Trainer & Instructional Designer

DATE
October 23, 2025


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Introduction



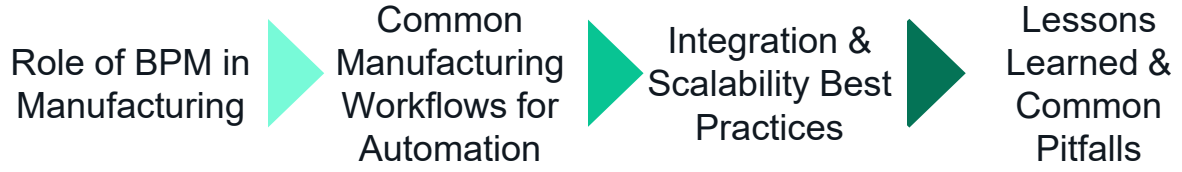
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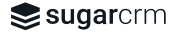


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Agenda:



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Role of BPM in Manufacturing

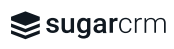
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The Role of BPM in Manufacturing



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The Role of BPM in Manufacturing

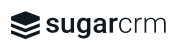
Why BPM matters in manufacturing



Manufacturing relies on precision, timing, and repeatable processes.

- BPM provides the structure to standardize, automate, and monitor
- Ensure every process runs the same way, every time
- BPM becomes the engine of operational excellence

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Key challenges solved: approvals, visibility, efficiency



- Approvals – ensuring faster turnaround and audit-ready traceability
- Visibility – provides real-time insight
- Efficiency – replaces manual emails and spreadsheets with automated, rule-driven workflows
- Consistency – enforces standardized procedures



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Real-world value: faster lead times, fewer errors, compliance





- Faster Lead Times – accelerating delivery cycles
- Fewer Errors – cutting rework and scrap rates
- Improved Compliance – maintaining ISO and regulatory compliance
- Empowered Teams – focusing on high-value work




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The Role of BPM in Manufacturing

<p>Why BPM matters in manufacturing</p>  <p>Manufacturing timing, and</p> <ul style="list-style-type: none"> • BPM provides the structure to standardize, automate, and monitor • Ensure every process runs the same way, every time • BPM becomes the engine of operational excellence 	<p>Key challenges solved: approvals, visibility, efficiency</p>  <p>cycles reword</p> <ul style="list-style-type: none"> • Visibility – provides real-time insight • Efficiency – replaces manual emails and spreadsheets with automated, rule-driven workflows • Consistency – enforces standardized procedures 	<p>Real-world value: faster lead times, fewer errors, compliance</p> <p>and scrap rates</p> <ul style="list-style-type: none"> • Improved Compliance – maintaining ISO and regulatory compliance • Empowered Teams – focusing on high-value work
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With BPM, manufacturers don't just automate—they gain control, visibility, and agility to respond faster to customers and market shifts.

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Common Manufacturing Workflows for Automation

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Common Manufacturing Workflows for Automation

Quotation Approval

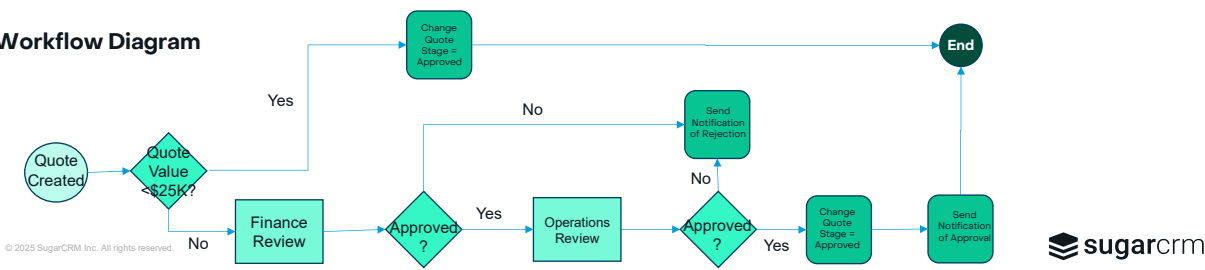
Scenario

A **mid-sized industrial equipment manufacturer** struggled with slow quote turnaround—sales reps waited days for pricing approval from management. Using SugarBPM, they automated approvals based on deal size and margin thresholds. Quotes under \$25K auto-approved; larger ones triggered a review by finance and operations.

Result: Quote approval time drops and increases the win rates and customer satisfaction.



Workflow Diagram



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Common Manufacturing Workflows for Automation

Order Status Updates & Customer Notifications

Scenario

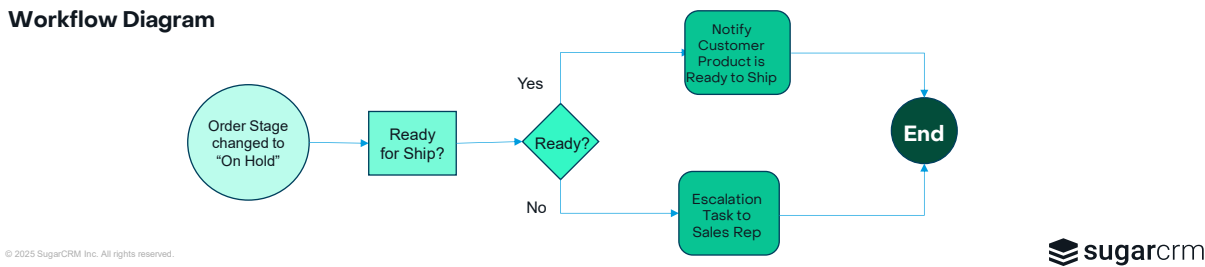
A custom-equipment manufacturer automated order status updates from production to customer via CRM alerts and tasks for Sales when delays occurred. (General manufacturing order-management use case)

Result:

- Customers received timely status updates rather than waiting for manual outreach.
- Sales could proactively handle delays or issues rather than react after the fact.
- Improved customer experience and fewer service enquiries.



Workflow Diagram



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Common Manufacturing Workflows for Automation Lead Qualification and Routing



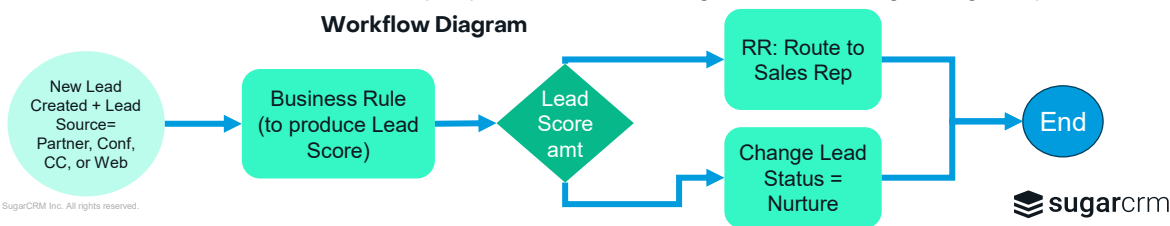
Scenario

A **B2B machinery manufacturer** struggled with manual lead handling — inquiries were often delayed or lost between marketing and sales. After automating lead qualification in SugarCRM, leads were scored automatically based on lead source, and company size. Qualified leads were routed to the right regional rep instantly.

Results

- Lead response time drops
- Conversion rate improved
- Sales reps spent more time selling, less time sorting through unqualified leads.

Workflow Diagram



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Demo: Building a Manufacturing Workflow

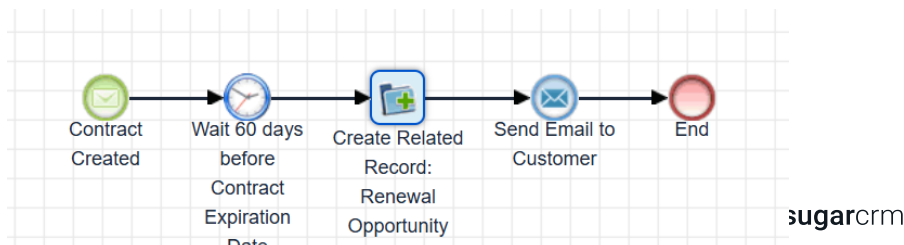
Contract Expiring Renewal Opportunity Created

Scenario

A **manufacturing equipment supplier** offers 1-year service contracts for maintenance and calibration. Before automation, renewal reminders were handled manually by account managers — often late or inconsistent. After implementing **SugarBPM** in **Sugar Sell**, the company automates the creation of the Renewal Opportunity and email to the customer.



Workflow Diagram



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Integration & Scalability Best Practices

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Integration & Scalability Best Practices



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Integrating with ERP/MES/Inventory systems

- Unified Data Flow: real-time access to product availability, pricing, and product schedule
- Automated Quoting & Order Management: consistency across systems
- Customer Transparency: accurate lead times and order status



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Integration & Scalability Best Practices



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Handling High-Volume workflows

- **Process Optimization:** Use scheduled or batch workflows for repetitive, high-volume tasks to reduce system strain.
- **Scalable Design:** Create modular, event-driven BPM processes that efficiently manage thousands of concurrent sales or order updates.
- **Prioritization Logic:** Automate task routing based on value or urgency to ensure critical opportunities get handled first as volume increases

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Integration & Scalability Best Practices

Avoiding overlapping or conflicting processes

- **Process Governance:** Assign clear ownership and maintain a shared process map to coordinate workflows across departments.
- **Trigger Controls:** Use conditions and event logic to prevent duplicate or conflicting BPM triggers.
- **Testing in Sandboxes:** Validate and refine integrations in a test environment to avoid data duplication or sync issues.



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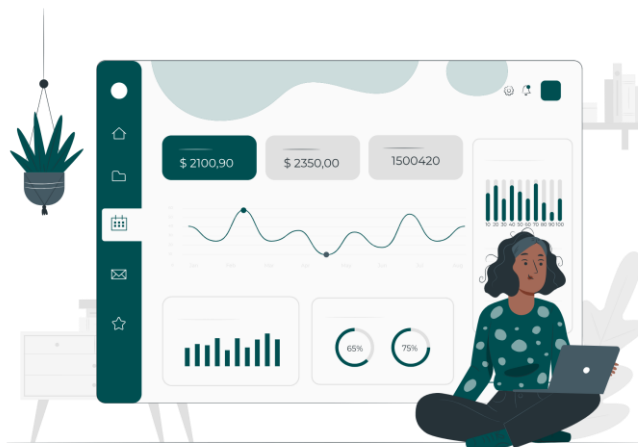


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Integration & Scalability Best Practices

Monitoring and Dashboards

- Sales Process Dashboards: Track key metrics like quote-to-order conversion, fulfillment rates, and integration performance in real time.
- BPM Monitoring: Use logs and process analytics to identify stalled or failed workflows early.
- Predictive Insights: Combine CRM and ERP data to forecast production needs and anticipate inventory or demand trends.



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Lessons Learned & Common Pitfalls

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Lessons Learned & Common Pitfalls



Avoid overcomplicating workflows

Start simple; focus on core objectives before expanding.

Overly complex workflows are harder to maintain and troubleshoot.

Simplicity improves performance, scalability, and user adoption.



Always Include Exception Handling

Plan for missing data, delayed approvals, or integration failures.

Add fail-safes like default assignments or automated escalations.

Proactive handling prevents process interruptions and downtime.



Use Version Control & Documentation

Track every workflow change with clear version history.

Document the purpose, triggers, and logic of each process.

Promotes collaboration, consistency, and easier onboarding.



Continuously Monitor and Refine

Review workflows regularly based on performance and feedback.

Identify and fix bottlenecks or outdated steps.

Treat workflows as living processes that evolve with business needs.

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Lessons Learned & Common Pitfalls

Customer Success Example

A SugarCRM customer simplified a complex lead management workflow.



Implemented structured exception handling and documentation.



Result: Faster cycle times and improved data accuracy.

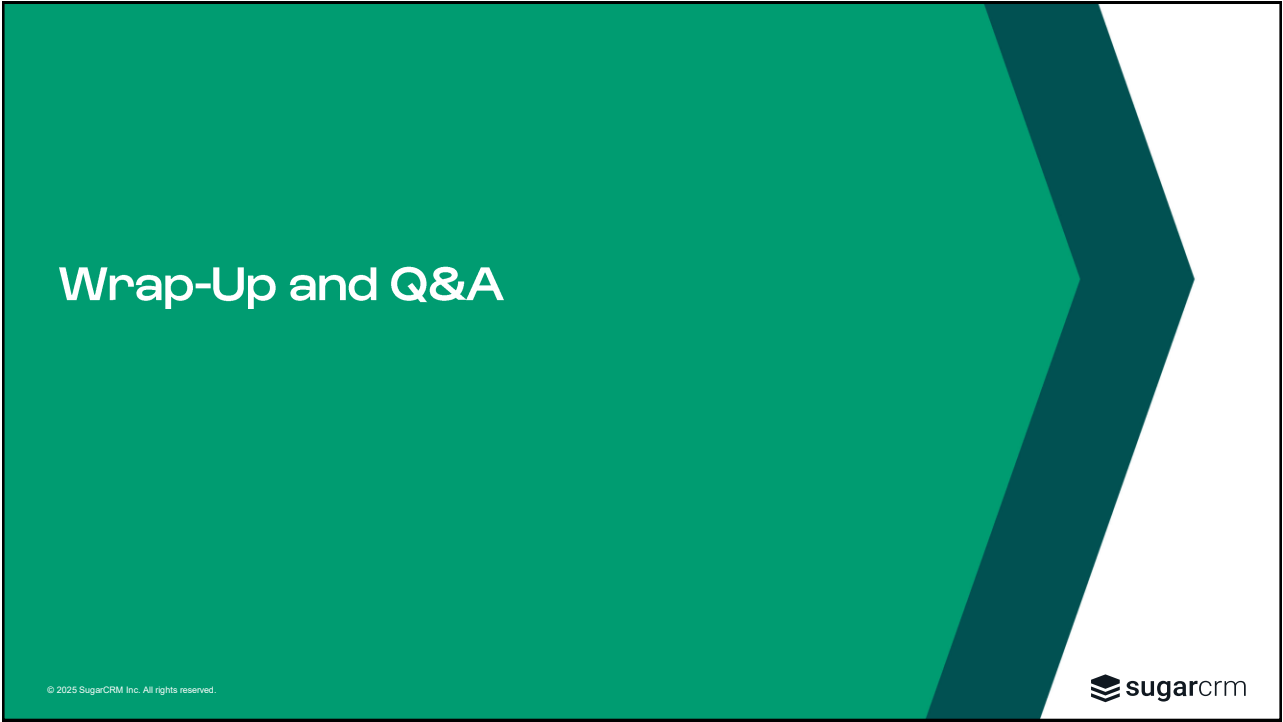


Key takeaway: clarity, control, and continuous improvement drive success.

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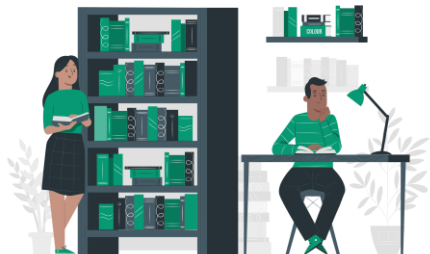


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SugarClub Resources



SugarU Live Webinar:

Nov 20: [Search & Filter Like a Pro:](#)

[Navigate Sugar with Speed](#)

Dec 18: [Effortless Data Management:](#)
[Simplifying Importing & Exporting in Sugar](#)

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The screenshot shows the SugarClub website interface. At the top, there is a search bar and navigation links for 'Ask a Question', 'Groups & Discussions', 'Product Information', 'Training & Certification', 'Adoption', 'Calendar', 'News', and 'Help'. The main heading reads 'Welcome to sugarclub'. Below this, there are several promotional cards: 'RELEASE CENTRAL' with a 'NEW UPDATES - SEPT 2025' badge, 'sales-i' (an IBM Business Partner), 'Sugar Intelligence Add-on for Enterprise', 'Join Social Club' (meets on the 2nd Thursday of each month), and 'Why Training Matters (Even if You've Been Using Sugar for Years)'. A 'News from Across SugarClub' section lists updates from partners like 'Withholding Tax Treatment - What Our Partners Need to Know' and 'Updates to Issue & Idea Visibility in the Support Portal'. A 'Who's Online Right Now?' section shows a list of active users. At the bottom, there are buttons for 'SUGAR NEWS', 'NEW RELEASES', 'SUGARU NEWS', and 'DEVELOPER NEWS'.

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Key Take Aways



- **BPM transforms manufacturing efficiency** — streamlining complex processes like quoting or order management
- **Automation accelerates outcomes** — reducing approval times, improving communication, and boosting customer satisfaction.
- **Integration is essential** — connecting CRM, ERP, and MES systems ensures accurate data, real-time visibility, and smooth operations.
- **Scalability and governance matter** — design workflows that can handle growth, avoid conflicts, and remain adaptable over time.


Continuous improvement drives success — monitor performance, document changes, and refine processes regularly.

Customer proof point: Manufacturers using SugarBPM have seen faster cycle times, higher lead conversions, and more proactive customer engagement.


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Thanks for attending!