



## Streamlining Manufacturing Workflows with SugarBPM

### Common Process & Best Practices

1. BPM provides the structure to standardize, automate, and monitor key activities across quoting, production, and fulfillment.
2. The primary goal of BPM is to endure faster approvals, real-life visibility, efficiency replaced manual processes and enforced consistency.
3. Real-world values: Faster Lead Times, Fewer Errors, and Compliance.
4. With BPM, manufacturers don't just automate – they gain control, visibility, and agility to respond faster to customers and market shifts.
5. Using SugarBPM, for Quotation Approvals, quote approvals times drop, win rates increase, and improved customer satisfaction.
6. BPM provides visibility across departments by integrating CRM, ERP, and MES (Inventory) systems.
7. Integrating BPM with ERP or MES systems provides real-time access to product availability, pricing, and product schedule.
8. Scalable BPM design includes using scheduled or batch workflows for high-volume tasks.
9. To avoid conflicting processes, teams should maintain a shared process map and use sandbox/text environments for testing.
10. Monitoring and dashboards help track key metrics like quote-to-order conversion, fulfillment rates, and integration performance.
11. Always start simple; avoid overcomplicating workflows early on.
12. Include exception handling to manage failures, delays, or missing data.
13. Maintain version control and clear documentation of workflow changes.
14. Treat workflows as living systems that evolve based on performance and feedback.
15. Their success demonstrates the value of clarity, control, and continuous improvements.

## Key Takeaways

---

- **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.

---

### SugarU Live Webinar:

Nov 20: [Search & Filter Like a Pro: Navigate Sugar with Speed](#)

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