



Predictive Customer Insights – Zero Effort

Sugar Discover is a radical new approach to pipeline analytics that makes it incredibly fast and easy to extract insight from your Sugar data. Track and analyze hundreds of meaningful, actionable opportunity metrics automatically. Rewind history, understand trends, and make accurate predictions about the future with historical opportunities data analysis.

Discover surfaces what's important now, automatically alerting you to changes in key metrics that are trending significantly above or below target, or that break from historical patterns. Even better, Discover makes these alerts actionable by providing Discovery Insights – related facts and patterns in the data that could be contributing to the change.

With Discovery Insights, you'll be able to quickly identify root causes and take action. Unlike a general-purpose BI tool, Discover provides real value on day one. With Discover, there is no need to build and maintain your own analytical database, no need to learn SQL, no need to run ETL processes, no need to learn complicated general-purpose BI tools, and no need to hire expensive technical resources. Any person with basic Sugar user skills can be exploring revenue data and discovering actionable insights.

Discover improves visibility into the sales funnel and conversion rates, as well as provides invaluable insights into historical trends, and the underlying dynamics of revenue performance. Discover gives users the ability to manage-by-exception with 24/7 metric tracking and alerts. With Discover, you empower your business users with key analytics and metrics, giving them the ability to take swift action on issues and opportunities as they arise.

sugar discover

Out-of-the-Box Pipeline Analytics ///

Pre-loaded with hundreds of high-value metrics, analytics, and KPIs out of the box.

Continuous Automated Analysis ///

Tracks predefined and custom metrics in real time, alerting users when significant pipeline changes are detected.

Discovery Insights ///

Augments metrics and alerts with actionable insight into the relevant factors impacting pipeline performance.

Benefits

- More predictable revenue resulting from:
 - Faster identification and resolution of pipeline problems and their root causes
 - Ability to identify sales and marketing opportunities quickly, more accurate forecasting
- Improved agility and speed of business
- Better business outcomes from more data-driven decisions
- Advanced Analytics and Insights with ten pipeline reports



Report	Insight
Average Deal Size Trend	Is our Average Sales Price (ASP) trending up or down over time?
Forecast Current vs Prior Quarters	How does the Current Quarter forecast compare to the same day in prior quarters?
Funnel Conversion, Velocity, and Flow Analysis	What are our conversion rate and velocity for Opportunities created last year? Where are Opportunities dropping out of the Sales Funnel?
Funnel Revenue Conversion and Velocity	What were our conversion rate (revenue) and velocity for Opportunities created last year?
Stalled Opportunities by Rep & Trends	What Opportunities have been in their current stage longer than expected? Are the number of stalled Opportunities trending up or down over time?
Opportunity Details	Opportunity Details pivot, use as a target for Drill Linking.
Pipeline: Creation Trend with Next 6 Months	What is the trend for pipeline creation (revenue, count) over the past 12 months? What is our pipeline for the next 6 months?
Sales Cycle Trend	Is the average length of our sales cycle trending up or down over time?
Sales Velocity by Stage	At which stage(s) of the Sales Funnel are we improving velocity?
Win Rate Trend	Is our overall win-rate trending up or down over time?

About SugarCRM

SugarCRM is how marketing, sales, and service teams finally get a clear picture of each customer to help businesses reach new levels of performance and predictability. Sugar is the CRM platform that makes the hard things easier.

Thousands of companies in over 120 countries rely on Sugar to achieve high-definition CX by letting the platform do the work. Headquartered in Silicon Valley, Sugar is backed by Accel-KKR.

To learn more visit www.sugarcrm.com or follow @SugarCRM.