

The industrial sales intelligence diagnostic



Are you capturing the revenue hiding in your existing accounts?

How to use this diagnostic

This framework gives industrial sales leaders a structured way to identify where revenue is slipping, where reps are leaving wallet share on the table, and where the highest-impact improvements to your sales motion can be made – fast. It takes 20 minutes to complete. Each “No” or “Unsure” is a revenue leak you can quantify.



Why industrial sales leaders need this now

Industrial distribution and manufacturing sales have always been complex – long account relationships, large product catalogs, multi-layered supply chains, and sales cycles that move at the pace of capital procurement decisions.

But the environment has shifted in three important ways:

The consolidation wave is here

Motion Industries acquiring robotics and automation specialists. Private equity building platforms across industrial MRO, hydraulics, and specialty distribution. The competitor landscape your reps have been navigating for years is being restructured from the outside.

B2B buyers are demanding more

Industrial buyers increasingly expect real-time inventory visibility and reps who show up to every conversation prepared with account-specific intelligence – not generic pitches.

The workforce is turning over

The experienced industrial sales rep who's been managing 40 accounts for 20 years is retiring. Their replacement will stay 3-5 years and needs to ramp fast. Without systems that transfer account knowledge, that transition is a competitor's opportunity.

The 5-question revenue leak diagnostic

Question 1: Do your reps know which accounts have reduced order volume in the last 60 days – before you tell them?

YES

Your reps have proactive account intelligence. You have at least partial ERP-CRM integration and some form of account health monitoring.

NO / UNSURE

Your reps are finding out about account drift the hard way – when the customer calls to reduce their contract, or when they don't show up in the next RFQ.

Revenue Leak Estimate: For a \$50M industrial book of business, a 5% decline in quiet accounts that goes undetected for two quarters = \$2.5M in revenue at risk. In a market with active consolidation, that account may not come back.

Question 2: Can your reps see, in their CRM, which product lines an account should be buying but isn't?

YES

You have product gap analysis and reps are using it to drive targeted upsell and cross-sell conversations.

NO / UNSURE

Your reps are selling what customers ask for. Your competitors are selling them what they don't know they need yet.

Revenue Leak Estimate: Industrial distributors that introduce product line gap analysis typically find 8–15% in incremental revenue from existing accounts within the first 90 days – revenue that was already in the account, just not captured.

Question 3: How long does it take for a new rep to be independently effective on an account they've inherited?

LESS THAN 60 DAYS

You have strong account documentation, CRM discipline, and onboarding support. New reps can leverage institutional knowledge quickly.

90 DAYS OR MORE

Every rep transition is a retention risk. Accounts go quiet during the handoff – and competitors with better intelligence fill the silence.

Question 4: How often do your sales leaders have visibility into account risk before it shows up in a missed quarterly target?

WEEKLY

Leaders can intervene early, coach effectively, and redirect resources to at-risk accounts before deals are lost.

MONTHLY OR AFTER THE FACT

Pipeline reviews are backward-looking. Leaders are managing history, not shaping the future.

Question 5: Do your reps spend more time selling or more time manually searching for account information?

MORE TIME SELLING

Your CRM and ERP are connected. Reps have account context at their fingertips. Admin burden is low.

MORE TIME SEARCHING

Reps are losing 30–60 minutes per day to manual data reconciliation. That's 12–25 hours per month, per rep, that should be in front of customers.

Scoring your results

0–1 “No” answers: **Strong foundation**

Your sales infrastructure is ahead of most industrial teams. The next level is predictive intelligence – moving from reactive account monitoring to proactive account guidance.

2–3 “No” answers: **Moderate revenue risk**

You have gaps that are costing you money today – in drift, in missed upsell, or in rep inefficiency. These are fixable within 30–60 days with the right ERP–CRM integration.

4–5 “No” answers: **High revenue risk**

Your sales motion is operating without the intelligence it needs to compete in a consolidating industrial market. The revenue you’re leaving on the table from existing accounts likely exceeds the cost of fixing it by a factor of 5x or more.



EIS Inc.

Managing electrical process materials across five ERPs. After deploying and sales-i, CRM adoption jumped from 30% to 95% – because reps finally had the ERP data they needed to manage customer interactions with precision, not guesswork.

95%

CRM adoption

What SugarAI does for industrial teams

- Connects to your ERP (read-only – no migration, no disruption) and surfaces buying signals reps can act on today
- Gives sales leaders real-time visibility into account health, deal risk, and rep focus – without requiring manual reporting
- Guides new reps through inherited accounts using account context and prep briefs from day one
- Reduces admin burden by auto-updating records and surfacing relevant information instead of waiting for it to be entered



LGG Industrial

150+ sales and service professionals.
Result: 3x the user adoption of their previous tools, and a platform that accelerates sales velocity through the buyer journey to realize revenue faster.

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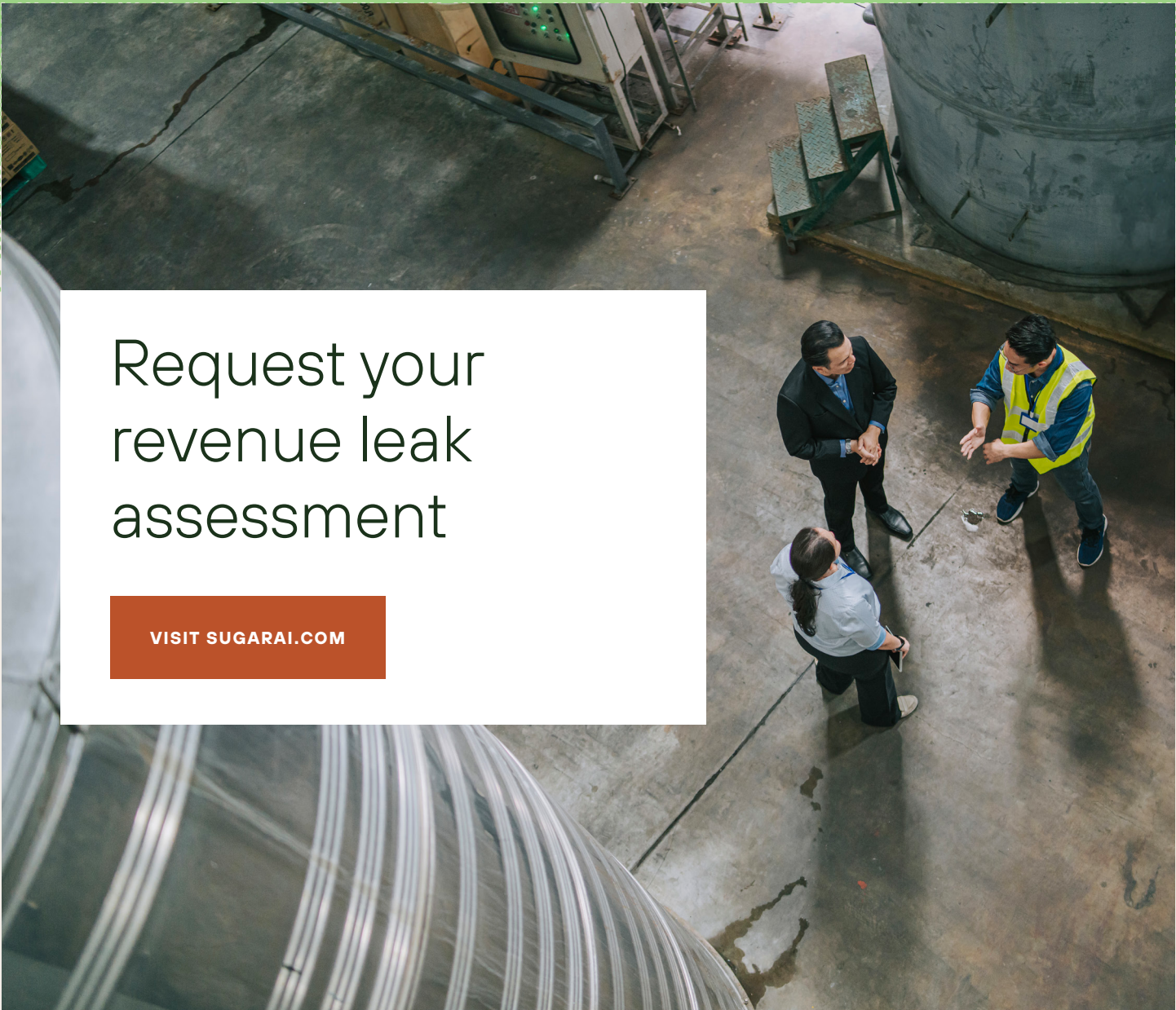
3x
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"Sugar is the ideal solution for B2B midmarket businesses like ours."

— ATIM BILLINGSLEY,
VP REVENUE OPERATIONS

Your next step: a 15-minute revenue leak assessment

We'll review your diagnostic results and estimate the revenue impact for your specific book of business, show you which accounts our ERP-connected intelligence would surface as at-risk in your first 30 days, and give you a realistic timeline for closing the gaps.



Request your
revenue leak
assessment

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Unlock sales potential

About SugarAI

SugarAI goes beyond traditional CRM to power account-first, AI-driven selling. Our Precision Selling platform helps sellers win and grow the accounts that matter most by uncovering hidden risk, revealing expansion opportunities, and guiding every next move for complex, relationship-driven businesses.

Learn more at www.sugarai.com