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Sugar Sell Foundations Webinar Series: Week 8
From Data to Direction: Mastering Reports in Sugar
Webinar Handout

1 Actionable Checklists & Worksheets

Report Builder Checklist

Use this checklist anytime you build a report in Sugar.

- ☐ Clearly defined the business question
- ☐ Identified the correct module
- ☐ Selected the right report type
- ☐ Applied filters to answer who / what / when
- ☐ Grouped data to reveal patterns
- ☐ Added summaries to highlight trends
- ☐ Chose table vs chart intentionally
- ☐ Saved, scheduled, and shared the report

Tip: If a report feels confusing, revisit the first three steps.

2 Fill-in-the-Blanks (Guided Notes)

Start With the Question: "I am building this report to understand _____."

> **Recommended answer:**
>
> *how my team's performance or pipeline is trending over time*

> **Other acceptable examples:**
>
> - *which opportunities are most likely to close this quarter*
>
> - *where deals are getting stuck in the sales process*
>
> - *how activity levels compare across reps or teams*

> ✅ **Pro Tip:** Reports start with a *business question*, not a feature.

Audience: "This report is primarily for _____."

> **Recommended answer:**
>
> *sales managers and team leads*

> **Other acceptable examples:**

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- *sales reps managing their own pipeline*

- *executive leadership*

- *operations or revenue teams*

  ✅ **Pro Tip:** Audience determines report type, level of detail, and visualization.

Decision Supported: "This report will help someone decide _____."

Recommended answer:

where to focus time and effort to improve outcomes

Other acceptable examples:

- *which deals need attention this week*

- *whether the team is on track to hit quota*

- *how to adjust strategy based on trends*

  ✅ **Pro Tip:** If a report doesn't support a decision, it's just data.

3️⃣ Key Reporting Principles

- Start simple — complexity can come later
- Match the report type to the goal
- Filters define *what's included*
- Grouping shows *patterns*
- Summaries reveal *trends*
- Charts clarify stories, not details
- Advanced reports are powerful, but not always necessary

4️⃣ Supplementary Resources & Deep Dives

Where to Learn More

Application Guide>Reports
Sugar Discovery Guide (Enhanced Forecasting)

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Advanced Reports
Help Article> Identifying User Roles via Advanced Reports
Sugar Club:
A simple custom Query like a for quick summary. Great for use in Advanced Reports
Exploring Enhanced Forecasting video
Standard vs. Enhanced Forecasting in Sugar Sell & Sugar Enterprise post
Sugar Discover: How to Replace a Field video
Sugar Discover: How to Find a Hidden Field video
Sugar Discover: How to Create a New Custom Report video
Sugar Discover: How to Change a Calculated Field Definition video

Recommended Next Step:

Rebuild one report you already use today using the principles from this webinar.

5 **Answer True or False:**

 T   F

1. X ☐ Rows & Columns reports are best for detailed lists

2. ☐ X Charts are always better than tables

3. X ☐ Filters decide which records appear in a report

4. ☐ X Advanced Reports should be the first option for most reporting needs

5. X ☐ Scheduled reports help drive ongoing visibility

Reflection Question:

"One reporting habit I want to change after this webinar is _____."

6 **Clear Call to Action – Your Next Steps**

Within the next 7 days:

1. Choose one report you currently use
2. Rebuild it using today's framework
3. Apply at least one improvement:
   o clearer filters
   o better grouping
   o or a more effective visualization

"The report I will rebuild first is _____."