

## Sugar Sell Foundations Webinar Series: Week 6

### Sales Mastery: Driving Growth with Sugar

#### Webinar Handout

#### Key Concepts – Fill in the Blanks

Complete the sentences using what you learned in the session.

1. Sales mastery depends on **consistency**, not heroics.
2. A CRM should support how sales **actually** runs.
3. Accurate pipeline stages should reflect real **progress**.
4. Clean data enables trusted **forecasts**.
5. Reports validate **behavior**, not just outcomes.
6. Dashboards provide **real-time** visibility without report digging.
7. Run the Business (RTB) creates a consistent operating **rhythm**.
8. Sugar should be treated as the system of **record**.

#### Matching – Match the Concept to Its Purpose

Draw a line between each item in Terms and the best match in Definitions.

##### Terms

- A. Pipeline Hygiene
- B. Dashboards
- C. Reports
- D. Activity Tracking
- E. Run the Business (RTB)

##### Definitions

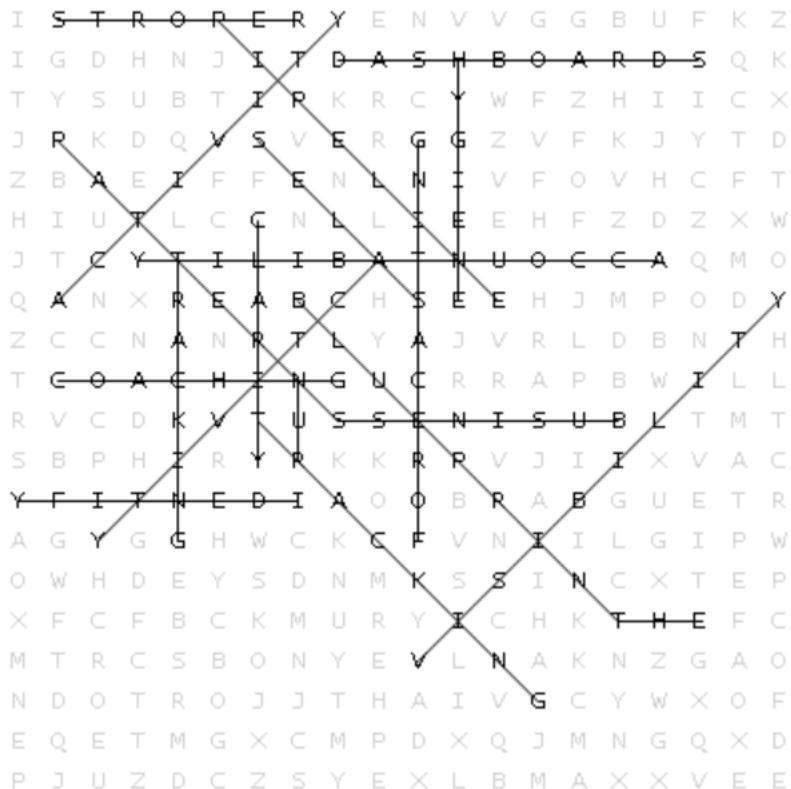
- 2. Ensures accurate stages, close dates, and data discipline
- 4. Shows real-time metrics for faster decisions
- 1. Supports coaching conversations with facts
- 5. Focuses on behaviors that drive results
- 3. Creates a consistent rhythm for meetings and forecasting

#### Word Search – Sales Mastery Vocabulary

Find the words hidden below (horizontal, vertical, or diagonal):

##### Words to Find:

PIPELINE HYGIENE  
DASHBOARDS  
ACCOUNTABILITY  
REPORTS  
FORECASTING  
ACTIVITY TRACKING  
COACHING  
SALES CLARITY  
IDENTIFY PATTERNS  
ACTIVITY TRACKING  
VISIBILITY  
BLUEPRINT  
RUN THE BUSINESS





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### Short Answer – Reflect & Apply

Answer briefly based on your role. (Answers may vary.)

1. What does “full pipeline visibility” mean for your team?
  - Seeing deal health by stage, size, timing, and ownership
  - Early risk identification
  - Fewer surprises in forecasts
  
2. Which pipeline hygiene practice do you need to reinforce most?
  - Updating stages accurately
  - Realistic close dates
  - Closing out stalled opportunities
  - Completing required fields
  
3. How could reports improve your 1:1 coaching conversations?
  - Fact-based 1:1 conversations
  - Coaching behaviors instead of opinions
  - Identifying patterns over time
  
4. Which dashboard metric would help you make faster decisions?
  - Pipeline health by stage
  - Forecast vs target
  - Activity trends
  - Win/loss patterns

### Fill-in the Blank – The Sales Mastery Blueprint

Complete the blueprint steps:

1. Define one sales process
2. Enforce data discipline
3. Validate with reports
4. Lead with dashboards
5. Embed into RTB (Run the Business)
6. Improve continuously

### Notes

Use this space to capture key takeaways, ideas, or action items.

Key Insights:

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Ideas to Apply in Sugar:

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Questions to Follow Up On:

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Thank You for Attending!

Next up in the series:

- [Feb 3: Seeing Success – Building Actionable Dashboards in Sugar](#)
- [Feb 10: From Data to Direction – Mastering Reports in Sugar](#)