



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

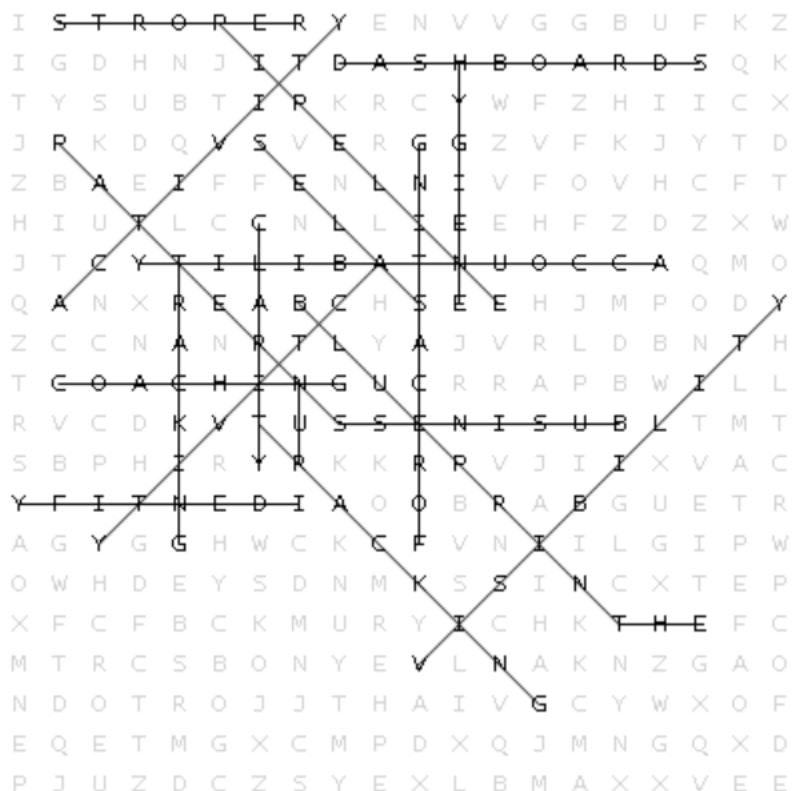
- 2. Ensures accurate stages, close dates, and data discipline
- 4. Shows real-time metrics for faster decisions
- 1. Supports coaching conversations with facts
- 5. Focuses on behaviors that drive results
- 3. Creates a consistent rhythm for meetings and forecasting

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:

Ideas to Apply in Sugar:

Questions to Follow Up On:

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](#)