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Sugar Sell Foundations Webinar Series: Week 7
Seeing Success: Building Actionable Dashboards in Sugar
Webinar Handout

Fill-in-the-Blank

Complete the sentences using concepts from the webinar.

1. Dashboards connect **strategy** to **execution** by making data visible and actionable.

2. A dashboard is a collection of **dashlets.**

3. Starting with out-of-the-box dashboard **templates** helps ensure consistency and faster setup.

4. Dashboards used in meetings should be **decision** -first, meaning every chart answers the question "**So what**"

5. Running meetings from dashboards replaces **slide** decks and uses **real-time** data.

6. To keep dashboards actionable, avoid **vanity** metrics such as total leads without **conversion** context.

7. A best practice for dashboard design is to limit dashboards to **6-9** dashlets.

8. If a decision does not live in **Sugar** by the end of the meeting, it probably will not **happen.**

Matching

Match each **dashboard type** with its **primary purpose**.

Dashboard Type

A. Personal Dashboard

B. Shared Dashboard

C. Pipeline Review Dashboard

D. Rep-Level Standup Dashboard

E. Executive Snapshot Dashboard

Purpose

1. Trend analysis and executive decision-making

2. Individual productivity and task management

3. Team alignment and shared visibility

4. Forecasting revenue and identifying deal risk

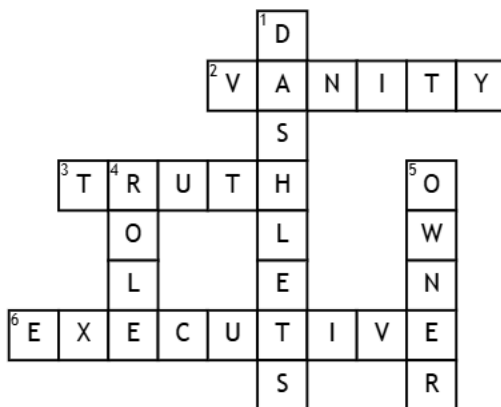5. Coaching conversations and short-term execution

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Crossword Puzzle

Use the clues below to complete the crossword.

		D						
	V	A	N	I	T	Y		
		S						O
T	R	U	T	H				W
	O			L				N
	L			E				E
E	X	E	C	U	T	I	V	E
	S			S				R

Across

2. Type of metric that looks impressive but drives no

3. A single source of _____ everyone can see during meetings

6. A dashboard built for leadership to review trends and risks

Down

1. Individual data components within a dashboard

4. Dashboards should be _____-specific based on the audience

5. Person responsible for explaining and acting on a dashlet

Scenario-Based Reflection (Sample answers)

Read each scenario and answer the question.

Scenario 1: Pipeline Review Meeting

You notice multiple opportunities slipping to future months during a live dashboard review.

Question:
Which dashlet would you review next, and what action would you take directly in Sugar?

Dashlet to review next: **Deals Slipping This Period** or **Opportunities Closing This Month**

Action in Sugar: **Click into the opportunity record and update close date / next steps live**

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Scenario 2: Sales Team Standup (Sample answers)

A rep has several overdue activities and no upcoming follow-ups.

Question:
What dashboard view helps surface this issue, and how can it be resolved in real time?

- View: **Rep-Level Standup Dashboard** with **Overdue Activities / Activities Due Today**

- Resolve in real time: **Filter by rep and reassign or create activities**

Action Items

Use this section to turn insight into action.

My Dashboard Commitments

- One meeting I will start running from a dashboard:

_____

- One dashboard I will build or update this week:

_____

- One vanity metric I will remove or replace:

_____

- One dashlet I will assign a clear owner to:

_____

_____

Notes & Takeaways

Key Ideas I Want to Remember

_____

_____

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Questions I Still Have

Quick Reference

Dashboard Best Practices

- Start with templates

- Standardize dashboards across teams

- Use filters to reduce duplication

- Assign an owner to each dashlet

- Review dashboards weekly

- Adjust dashboards as priorities change

Core Takeaway

Dashboards turn meetings into working sessions—and Sugar becomes the place where decisions are made, not just recorded.