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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 _____ to _____ by making data visible and actionable.

2. A dashboard is a collection of _____.

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

4. Dashboards used in meetings should be_____ -first, meaning every chart answers the question "_____?"

5. Running meetings from dashboards replaces _____ decks and uses _____ data.

6. To keep dashboards actionable, avoid _____ metrics such as total leads without _____ context.

7. A best practice for dashboard design is to limit dashboards to _____ dashlets.

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

Matching

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

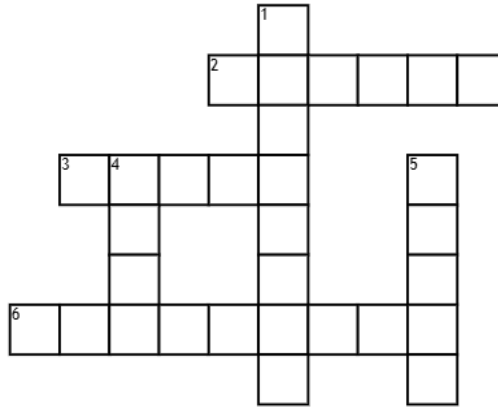| Dashboard Type	Purpose
A. Personal Dashboard	1. Trend analysis and executive decision-making
B. Shared Dashboard	2. Individual productivity and task management
C. Pipeline Review Dashboard	3. Team alignment and shared visibility
D. Rep-Level Standup Dashboard	4. Forecasting revenue and identifying deal risk
E. Executive Snapshot Dashboard	5. Coaching conversations and short-term execution

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Crossword Puzzle

Use the clues below to complete the crossword.

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

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?

_____

_____

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Scenario 2: Sales Team Standup

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?

Section 5: 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:

Section 6: Notes & Takeaways

Key Ideas I Want to Remember

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Questions I Still Have

Section 7: 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.