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

Andrea Ayers, Sr. Product Trainer & Instructional Designer

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Andrea Ayers

Sr. Product Trainer & Instructional Designer

Certified Sugar Admin Specialist (CSAS)

SugarUniversity

Austin, TX

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Housekeeping & What to Expect

- Session timing and Q&A
- Recording and slides
- How to submit questions

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Why Dashboards Matter?

- Visibility drives better decisions

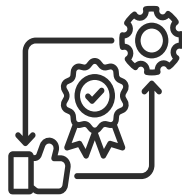- Dashboards connect strategy to execution

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What You'll Learn Today

Build Dashboards Using Templates

Create Standard, Sharable Views

Run Meetings from dashboards

Best practices and examples

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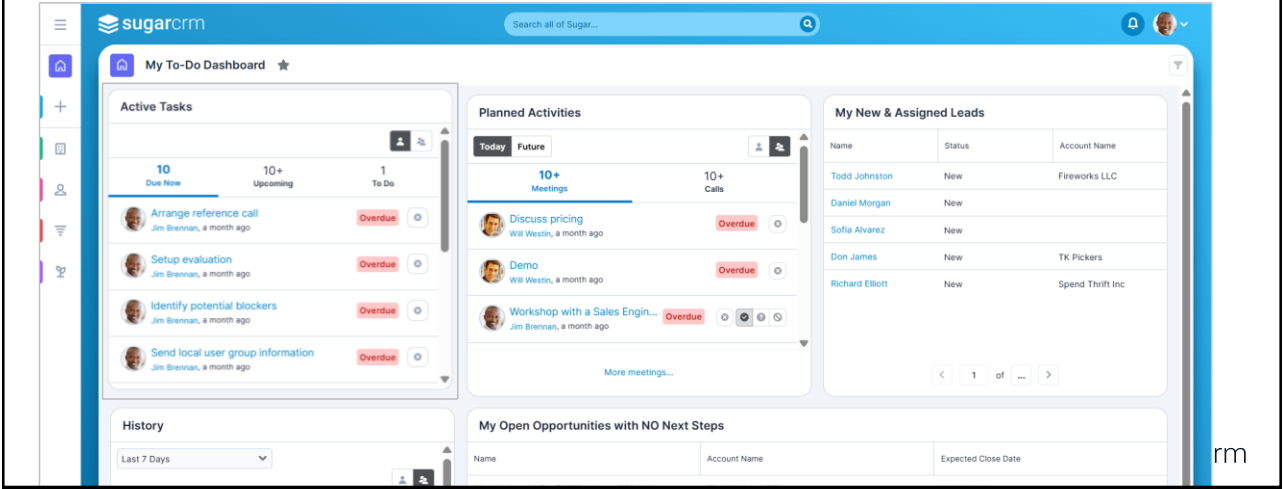## Out-Of-The-Box Dashboard Templates

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What Is a Dashboards & Dashlets in Sugar?

Dashboards

- Collection of dashlets
- Available across Sugar views

Dashlets

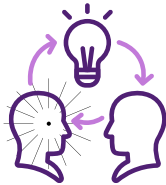- Individual data components
- Charts, lists, metrics

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Dashboard Types & Visibility

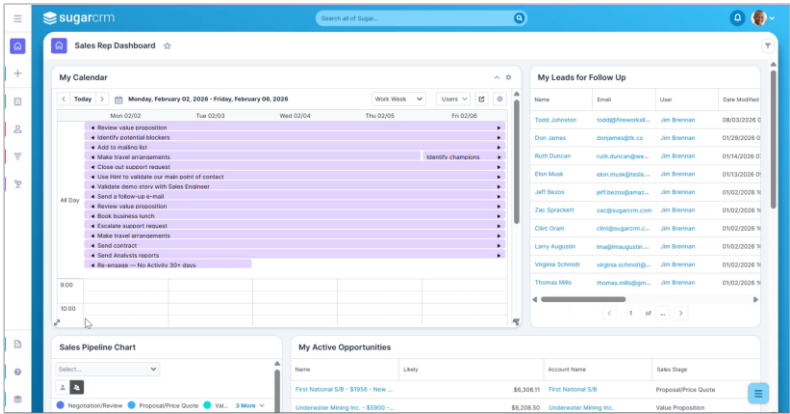**Personal dashboards**

Shared dashboards

Default dashboards

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Why Start with Templates?

Prebuilt layouts

Faster setup

Consistency

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Demo: Create Dashboard from Template

Select template

Duplicate and rename

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Creating Shareable Dashboards

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Customizing Your Dashboard

Edit filters

Resize & rearrange

Focus on relevance

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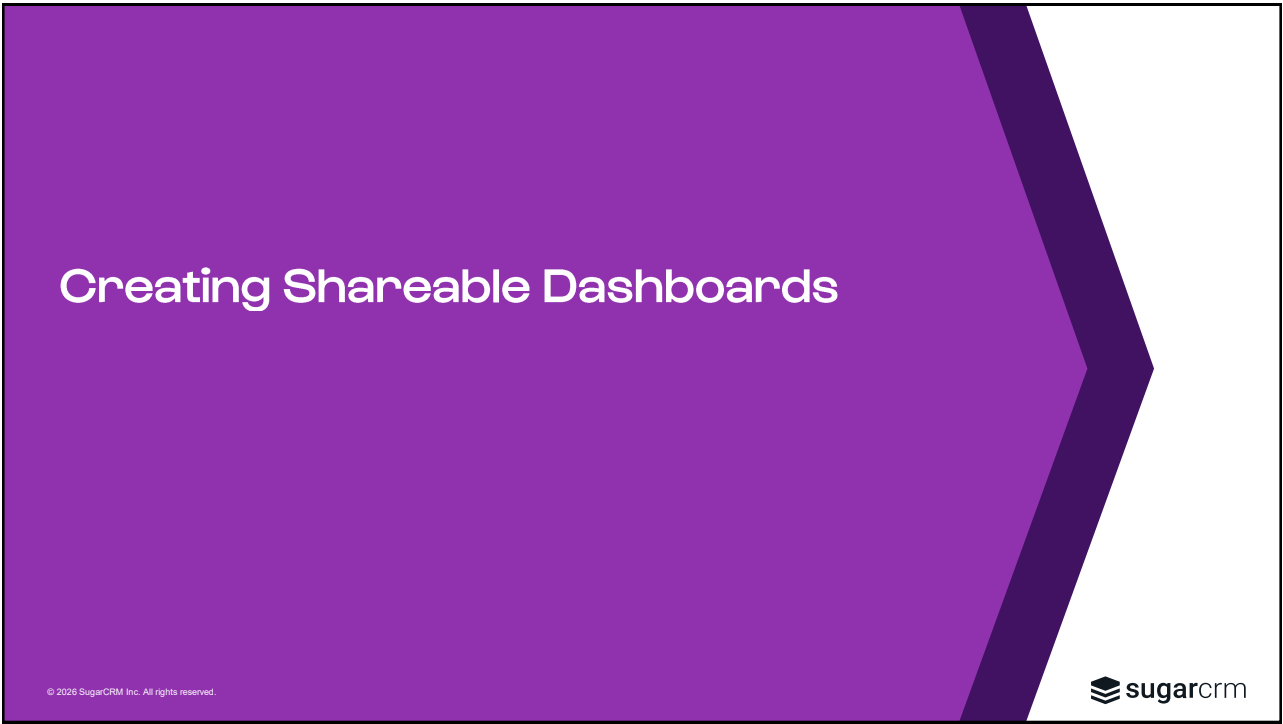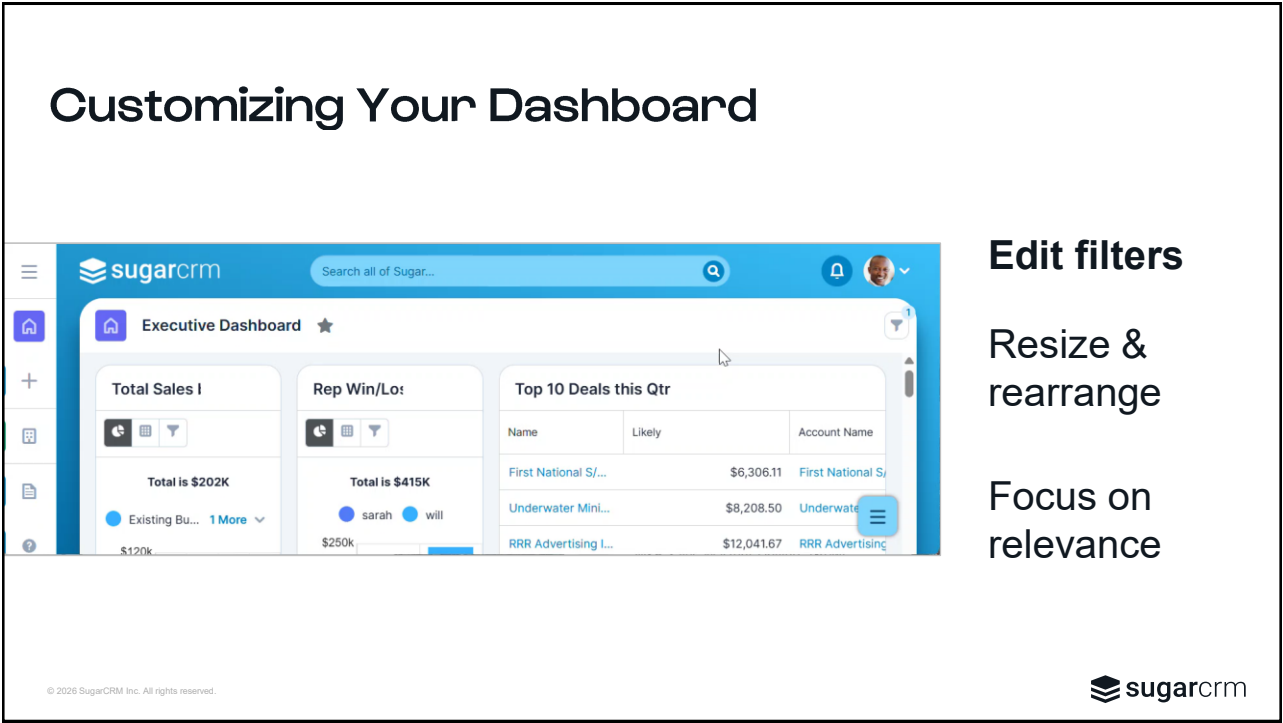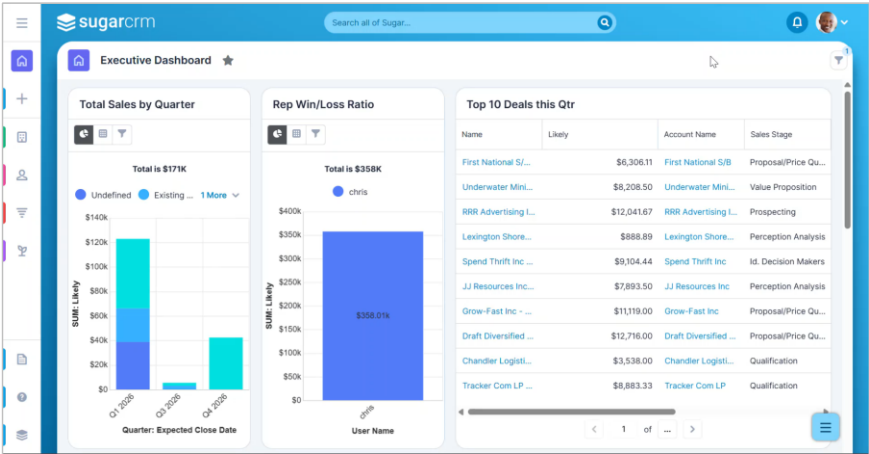
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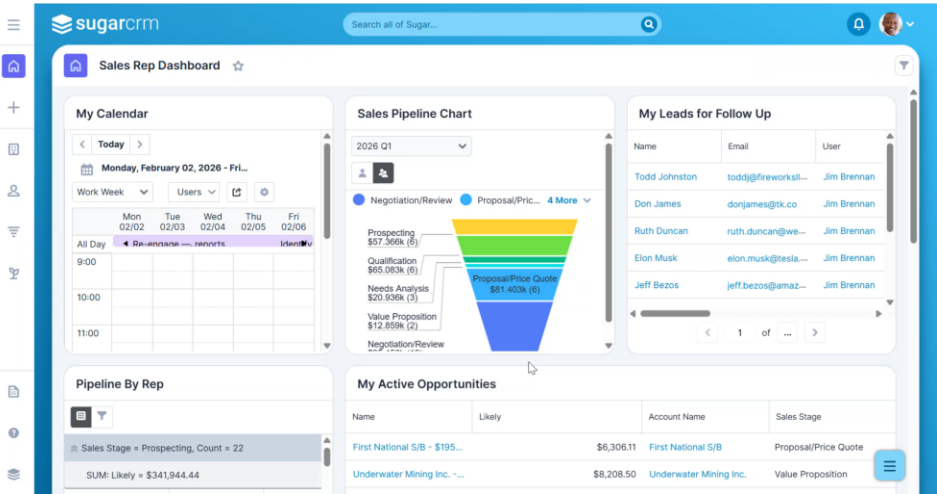
Customizing Your Dashboard

Edit filters

Resize & rearrange

Focus on relevance

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Customizing Your Dashboard

Edit filters

Resize & rearrange
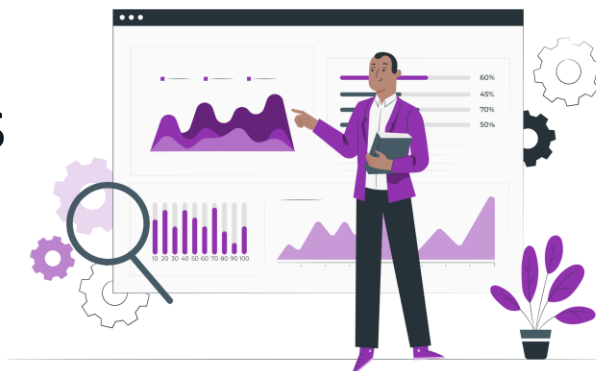
Focus on relevance

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Personal vs
Shared Dashboards

- Individual productivity
- Team alignment

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Standardizing Team Dashboards
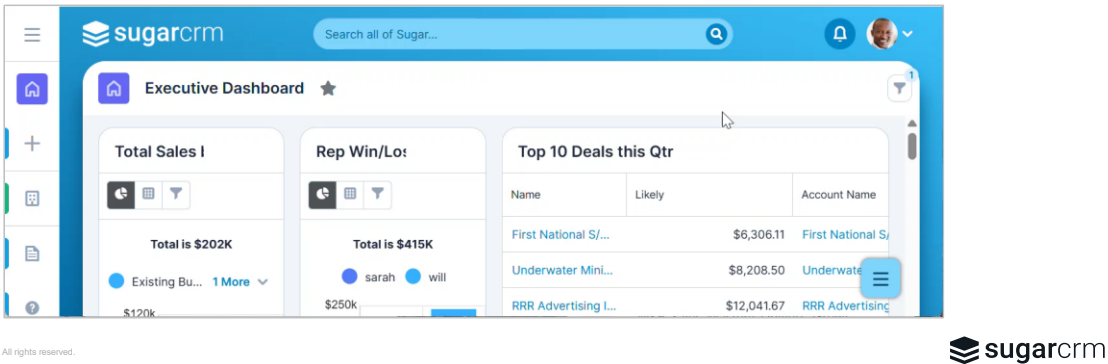
- Role-based views
- Naming conventions
- Reusablity

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Using Dashboard Filters

- Flexible views
- Less duplication

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Demo: Sharing Dashboards

How End-User Individually Sharing a Dashboard

Two Ways that Admin Can Share Dashboards

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Copy Preferences and Content

- **From Modules**: Select this option to copy all of the source user's dashboards from a designated module.
- **Existing Dashboards**: Select this option to locate specific dashboards to copy from the source user.

Note: When a dashboard is selected as a favorite by the source user, it will be identified as a favorite in all user accounts to which the dashboard is copied.

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Running Meetings from Dashboards

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Why Run Meetings from Dashboard
Why Dashboards=Better Meetings

- Replaces slide decks
- Uses real-time data
- Eliminates subjective updates
- Creates a **single source or truth** everyone can see
- Keeps meeting focused on *what to do next, not what happened*
- Makes Meetings shorter and more predictable

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Meeting Types & Recommended Dashboards

Sales Pipeline / Forecast Meeting

Pipeline Review Dashboard
Recommended Dashlets
- Pipeline by Stage (weighted)
- Forecast vs. Quota (bar or gauge)
- Opportunities Closing This Month (list view)
- Deals Slipping This Period
- No-Activity Opportunities (last X days)

How to run the meeting

1. Start with Forecast vs. Quota
2. Drill into **Closing This Month**
3. Click directly into records for discussion
4. Update close dates or next steps live

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Meeting Types & Recommended Dashboards

Sales Team 1:1 or Team Standup

Rep-Level Standup Dashboard

Recommended Dashlets

- My Open Opportunities
- Activities Due Today
- Overdue Activities
- Leads Without Follow-up
- Recently Updated Accounts
  - Filter dashboard by rep
  - Reassign or create activities in real time

How to run the meeting – Ask…

1. What's blocked?
2. What needs help today?
3. What can be closed this week?

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Meeting Types & Recommended Dashboards

Executive/Leadership Meeting

Executive Snapshot Dashboard

Recommended Dashlets

- Revenue YTD vs Target
- Pipeline Coverage Ratio
- Win Rate Trend
- Top 10 Deals
- Churn/Renewal Risk
  - Toggle time filter from month to quarter
  - Highlight one risk metric and drill down

Executives care about

- Trends, not transactions
- Risks and Opportunities
- Where to intervene

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Meeting Types & Recommended Dashboards

How to Run the Meeting Live in Sugar

Facilitator Playbook

1. Open the dashboard *before* the meeting starts
2. Set Filters (time period, team, region)
3. Share screen (no PowerPoint)
4. Click into records as questions come up
5. Capture decision directly in Sugar

Pro tip
If it doesn't live in Sugar by the end of the meeting, it probably won't happen.

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Common Mistakes (and How to Fix Them

Mistakes
× Too many charts
× Historical-only data
× No ownership
× Dashboards no one uses outside meetings

Fix
• Assign an owner to each dashlet
• Review dashboards weekly
• Adjust dashboard as priorities change

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Close: Make Dashboards the Habit
From Meeting to Momentum

- Key Takeaways
  - Dashboards turn meetings into working sessions
  - Sugar becomes the place where decisions are made – not just recorded
- Optional Call to Action
  - "Which meeting will you convert to a dashboard first?"

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Dashboard Design Principles for Meetings

- **Decision-first:** Every chart should answer "So what?"
- **Time-bound:** Current Week/Month/Quarter only
- **Role-specific:** leader ≠ rep ≠ exec
- **Actionable:** Clear owners and next steps

Best Practice
- Limit to **6–9 dashlets max**
- Use **List Views** over charts when action is required
- Avoid vanity metrics (e.g., total leads without conversion context)

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Q&A and Next Steps

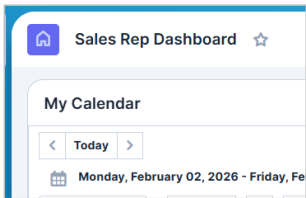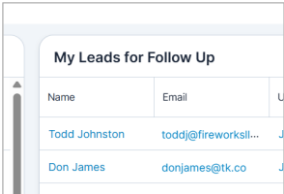sugarcrm

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Key Takeaways

Start with templates	Standardize dashboards	Use dashboards to run the business

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Additional Resources

- [Dashboards and Dashlets Application Guide](#)
- [Dashboard Templates](#)
- [Take Advantage of Sugar's New Feature: Dashboard Filtering](#)
- [Using the Role-Based Dashboard Templates](#)
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Questions?

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