Practical morning dashboard checklist

What a sales manager should review on the dashboard before the morning follow-up block

Owner: _____ Date: _____

- [ ] Open the role-relevant dashboard view and confirm it is focused on sales follow-up, not general reporting.
- [ ] Review new and overdue items first, then separate them into act now, assign today, or monitor.
- [ ] Check each open item for owner, customer context, and the clean next step before assigning it.
- [ ] Move or resize widgets so the most urgent follow-up information stays visible during the review.
- [ ] Schedule saved reports by email if the team needs a consistent morning starting point.

Notes and next steps

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Adapt this checklist to your dealership’s process.

Read the article on Goxee