monday academy

Daily workflow: sales rep in monday CRM Cheatsheet

Stay organized, follow up on time, and close deals faster

Core sales pain points & monday CRM solutions

Too many tools, scattered info?

Use the **Opportunities board + Overview tab** to see every deal, stage, and past activity in one hub.

Forgetting to follow up?

Add **Activities with reminders** or use **Automations** to set reminder dates automatically.

Spending too much time on emails?

Draft with the **AI assistant**, **summarize threads**, and save **templates** for reuse.

Not sure which deals matter today?

Filter to **"My deals"** and group by **Expected close date** or **Priority**. Automations can raise risk flags.

Best practices for managing your book of business

- Check the **Opportunities board** and **My Work** every morning to see today's tasks
- Favorite your most important boards for 1-click access
- Log every client interaction in **Emails & Activities**
- Use **short AI prompts** ("write a polite follow-up") for fast drafting
- Keep email **templates short and client-focused**
- Use **grouped views** (by close date/priority) to focus your pipeline
- **Automate reminders** for high-stakes stages like Negotiation or Proposal sent
- Scan your **Dashboard** at the end of the day to confirm revenue, activities, and pipeline health