Sales Workspace: Your Switching Guide

Last Updated: March 16

What You Need to Know

On April 27, the sales workspace will be updated to work directly with your Smart CRM. The updated experience replaces custom-built workspace interfaces with native CRM index pages, eliminating duplicate setup and giving your reps access to every new CRM feature automatically.

This guide will help you:

- Understand what's changing in your workspace
- Assess which changes affect your team's workflows
- Prepare your team for the switch
- Configure settings to match how your team works

⚠️ **How to switch**
Admins can manually switch the updated workspace early via a toggle in Sales Workspace Settings. The toggle will be available after April 27 for a limited time.

What’s Changing & How to Use This Guide

The Big Picture

Three major areas are changing:

1. **Summary Page** → Redesigned with flexible card layout and new focus cards
2. **CRM Pages** → Prospects/Deals tabs replaced with Companies, Leads, and Deals CRM index pages
3. **Task Queues** → Custom playlists replaced with CRM task queues

Meetings, Tasks, and Dashboard tabs remain exactly the same.

How to Use This Guide

Each section covers a specific workflow area. Use this approach:

1. **Read the summary** to understand what changed
2. **Check "Does this affect you?"** to see if you need to take action
3. **Complete the action checklist** for areas that impact your team

Table of Contents

For Admins & Managers

Quick Summary

If you're an admin or manager, there are important changes to how you configure Sales Workspace and manage your team's views. Settings for CRM objects have moved, and view-as mode is no more.

What Changed

Sales Workspace Settings

Before:

- Configure deals, leads, and guided actions in workspace settings
- Workspace-level team/user controls

After:

- **Object settings moved:** Configure deals, leads, and companies in their respective object settings pages
  - Deals: Settings > Objects > Deals
  - Leads: Settings > Objects > Leads
  - Companies: Settings > Objects > Companies
- **Guided actions configuration has been removed**
  - Guided actions have been rebuilt and renamed to suggested tasks
  - Suggested tasks are not configurable.
- **Team/user-level permissions remain:** You can still customize how workspace appears to different teams and users through user permissions.

View-As Mode

Before:

- View-as mode worked across all workspace tabs
- Managers could impersonate any user for coaching/onboarding

After:

- View-as mode is unavailable

    - Instead, use *shared views* for Leads, Deals and Companies to view a rep's sales activities
- **Sales Hub Enterprise** customers can still use the *Log in as another user* function in Settings.

Does This Affect You?

Have you ever onboarded or coached a rep using view-as/impersonation?

Then, use the ability to share saved views to gain visibility into your rep's sales activities. Or if you're on Sales Hub Enterprise, leverage the ability to log in as another user.

Action Checklist

- [ ] **Locate new settings locations:**
    - Update any internal documentation about where to configure workspace
- [ ] **Set up view-as workarounds:**
    - Use Shared views to understand different team perspectives
    - Use *Log in as another user* for full coaching sessions
- [ ] **Update all training materials:**
    - Replace screenshots
    - Document new click paths for common actions
    - Create quick reference guides for new workflows

Tips for Managers

Key message: "View-as mode is not available anymore. You can now leverage views to see what your team is up to or use *Log in as another user* in Settings."

Summary Page

Quick Summary

The Summary page now offers flexible card layout with drag-and-drop customization. Two new cards surfacing stalled deals and meeting follow-ups. Guided Actions have been renamed to Suggested Tasks with improved recommendations.

What Changed

Before	After
Fixed cards	**Drag-and-drop** to reorder any card or collapse cards you don't need
Guided Actions as separate card	**Suggested Tasks** (renamed from Guided Actions) with smarter recommendations
Schedule only has **calendar view**	Schedule can be toggled between calendar and **list view**
	New **Stalled Deals** card surfaces opportunities needing attention
	New **Follow-up on Meetings** card highlights uncommitted actions

Does This Affect You?

Everyone sees these changes. The Summary page is the first thing reps see each day.

Action Checklist

- [ ] **Understand the new layout** - Check out the demo or interactive walkthrough on the Sales Workspace Resource Center
- [ ] **Train reps on customization** - Show them how to drag cards and collapse unused ones

- [ ] **Explain Suggested Tasks** - Same next-best actions recommendations, new name. Smarter and fewer recommendations, no more stale tasks.
- [ ] **Show schedule toggle** - Reps can switch between calendar and list view in the sidebar
- [ ] **Update all training materials:**
    - Replace screenshots
    - Document new click paths for common actions
    - Create quick reference guides for new workflows

Tips for Training

Key message for reps: "Your Summary page is now customizable. Drag cards to reorder them, collapse what you don't use. Focus on what matters most to you."

Common questions:

- "Where did Guided Actions go?" → Now called Suggested Tasks
- "Can I hide cards?" → Yes, click the down arrow to collapse
- "Will my layout save?" → Yes, your arrangement persists

Tasks Queues

Quick Summary

To complete tasks, reps will now use CRM task queues instead of custom workspace ones. Reps now see the full record instead of a condensed view. Controls moved from side panel to top banner. A fold out side panel is still available.

What Changed

Before	After
Side panel with navigation controls	**Top banner** with optional side panel
Condensed record view	**Full record** with all associations visible recent activities, signals, related objects

Does This Affect You?

Yes, if your reps regularly complete tasks out of the workspace.

Action Checklist

- ☐ **Show reps the new controls** - Top banner instead and optional side panel
- ☐ **Highlight the benefit** - Full record view means better context for each task
- ☐ **Adjust workflows if needed** - If jumping between tasks was critical, consider different task prioritization by type.
- ☐ **Update all training materials:**
    - Replace screenshots
    - Document new click paths for common actions
    - Create quick reference guides for new workflows

Companies

Quick Summary

The Companies tab now shows the Companies CRM index page instead of the custom account-based selling view. Target Accounts users have two options now: dedicated app or create a saved view.

What Changed

Before	After
Custom-built table showing **only Target Accounts**	**Companies CRM index page** with all companies visible (not just Target Accounts)
Workspace-specific saved views	Saved views work in both workspace and CRM

Does This Affect You?

If you use Target Accounts: YES - You need to choose an approach (see checklist)

If you don't use Target Accounts: Minimal impact - Your reps see all companies now.

Action Checklist for Target Accounts Users

Choose your approach:

Option A: Target Accounts App

- Navigate to Sales > Target Accounts
- Bookmark for easy access
- Train team on new location

Option B: Saved View in Companies Tab

- Create view with filter "Target Account = Yes"
- Add relevant columns (tier, industry, revenue, etc.)

- Save as team view

Action Checklist for Non-Target Accounts Users

- [ ] **Consider creating/updating saved views**: Help reps filter to companies they care about
- [ ] **Update all training materials:**
    - Replace screenshots
    - Document new click paths for common actions
    - Create quick reference guides for new workflows

Leads Tab

Quick Summary

Leads is now a full CRM object with standard index page, board view, and saved views. Several actions from the table have moved to the lead record page.

What Changed

Before	After
Custom Leads table with workspace-specific features, like • "Start all" button to work through leads sequentially in a queue • Schedule next activity from table	Standard CRM index page with board view available, but: • No more "Start all" leads task queue • Schedule next activity or change company requires extra click into lead record
Analyze tab for lead reporting	Reports available in Lead Pipeline Overview dashboard template
	Stage duration visible on record page only

Does This Affect You?

If you have BDRs who work leads daily: YES - This is a MAJOR workflow change that may require retraining

Action Checklist

- [ ] **Assess workflow impact:**
    - Identify how your BDRs currently work leads
    - Document usage of bulk action workflows (sequence enrollment, task creation)
    - Calculate how much additional time new workflows will take

- [ ] **Create essential saved views** for your team:
    - Like "My Active Leads", "Hot Leads", and “New Leads”
    - Set default views for users to minimize confusion
    - Test that all critical information is visible
- [ ] **Develop new workflows for removed features:**
    - **For "Start All" replacement:** Consider using board view to work through leads by status visually, or use Pipeline Automation to automate outreach and follow-up task creation
- [ ] **Update all training materials:**
    - Replace screenshots
    - Document new click paths for common actions
    - Create quick reference guides for new workflows
- [ ] **Point team to new reporting location:**
    - Reporting > Dashboards > Create Dashboard > Lead Pipeline Overview
    - Create custom dashboard if needed for team metrics
    - Consider adding this dashboard to the workspace’s dashboard tab

Tips for Training

Key message for BDR teams: "Leads now work like other CRM objects. Some quick actions have been removed or been moved, which means your workflow will change."

Common questions:

- "Why can't I use 'Start All' anymore?" → The workspace now uses standard CRM views. Work through your leads using board view or create a daily task list.
- "Where’s the Analyze tab?" → Sales > Sales Analytics > Lead Pipeline

Deals Tab

Quick Summary

The Deals tab now shows the full CRM Deals index page with top-level analytics, board view, and full customization. The preview panel is replaced by the standard CRM side panel.

What Changed

Before	After
Custom Deals view with workspace-specific layout	**Full CRM Deals index page**
Large preview panel with Deal Score, Deal Insights, and Deal Stage Tracker	**Standard CRM side panel** (can be configured to show Deal Score and Deal Insights)
Alerts below deals in the table	Alerts only available in the Deal Insights module.
Workspace-specific saved views	Saved views work in both workspace and CRM

Does This Affect You?

If reps work deals in the workspace daily — YES, prioritize reconfiguring the side panel to ensure the modules they're used to are still readily available.

Action Checklist

- [ ] **Create saved views**:
  - "My Open Deals", "Closing This Month", "Team Deals" for managers, etc
  - Set default views for your users
- [ ] **Configure CRM side panel** to replace previous preview panel functionality:
  - Add these cards:
    - Deal Score
    - Deal Insights
    - Breeze Summary

- [ ] **Train reps on stage updates:**
    - Click into deal record to update stage, or
    - Use board view for visual stage management, or
    - Bulk edit stages from list view
- [ ] **Update all training materials:**
    - Replace screenshots
    - Document new click paths for common actions
    - Create quick reference guides for new workflows

Tips for Training

Key message for reps: "Your deals now live in the full CRM index page. Same data, different UI."

Before/After for sidepanel:

- **Old preview panel had:** Deal Score, Deal Insights, Deal Stage Tracker
- **New sidepanel can have:** Deal Score card, Deal Insights card, Breeze Summary, and more
- **To update stage:** Click into the deal record (or use board view)

Common questions:

- "Where's the Deal Stage Tracker?" → Update stages on the record page or board view

---

Additional Context

What Stays Exactly the Same

These areas have **no changes**:

- **Meetings tab**
- **Dashboard tab**
- **Tasks tab**

How to switch early

Admins can enable the updated workspace before the April 27 forced migration using the toggle in Sales Workspace Settings. This lets you explore the changes and prepare your team at your own pace.

Recommended Approach

Take your time to understand the impact before committing to your team.

1. Explore on your own

- Use this resources, our demo video, and interactive walkthrough to understand what is changing
- Document which workflows will be impacted

2. Assess and configure

- Determine which changes affect your team most
- Set up saved views, configure deal side panels, decide on your Target Accounts approach
- You have until April 27

3. Train your team

- Plan and run training sessions
- Update training decks, screenshots, and internal docs
- Give reps time to practice and ask questions

4. Switch your team when ready

- Enable the toggle to roll the update out to all users
- If you hit a blocker after switching, you will be able to revert back via the Settings toggle until April 27.

Support & Resources

Need help? Visit the Sales Workspace Resource Center for the latest official resources.

Questions? Don’t hesitate to contact your CSM or partner for help.