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Salesperson Weekly Review Sheet

(Sales Manager Copy)

Name _____

Date _____

Week of _____

1. Conduct Big 3 Goal Review Weekly to open the session. (Let this guide the direction of the weekly review. Dig Deep, as needed_

a. Review last week’s Big 3 goals

i. _____

ii. _____

iii. _____

2. Conduct Self-Assessment (1-10) (Do not use 7) (Key questions are: Why that number?

What would it have taken to be a 10?)

a. Behavior _____

i. Guts _____

ii. Discipline _____

iii. Vitality _____

b. Attitude _____

i. Mind _____

ii. Body _____



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iii. Spirit _____

iv. Tribes _____

c. Technique _____

3. Conduct Sales Call Review Counseling. (Focus on customized, individual sales coaching as well as providing sales innovation to help sales people get unstuck.)

a. Best Sales Call:

b. Most Challenging Sales Call:

c. Something salesperson did out of comfort zone.

4. Ask Salespeople where they feel stuck. What are their Questions/Concerns/Issues?



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5. Set Next Week's Big 3 Goals for the week of _____ At the end of the session. (Encourage inclusion of current key sales activities, such as "follow-ups of last week's sales calls/ proposals)

a. _____

b. _____

c. _____