Weekly 1 to 1 template (for sales managers and reps)

While sales manager and sales rep 1 to 1 meetings are important, they’re often unstructured. However, having a structure in place can make it easier to track progress week-to-week and ensure that you come out of each weekly 1 to 1 with actionable plans to help reps achieve their goals incrementally.

Use this quick and easy template as a guide to help structure your sales team’s 1 to 1 meetings and instantly make them a more productive use of time. The notes and discussion points are just a suggestion, so tailor them to your sales team’s specific requirements as and when you need.

With that said, here’s your template!

| Topic | Notes & discussion points |
| --- | --- |
| From last week’s meeting: | Quickly recap the previous 1 to 1:   * What action points were discussed last week? * How were those actioned? * Any relevant/related stats? |
| Challenges and blockers | Did anything hinder progress over the last week?   * Was anything more challenging than expected? * Were there any significant blockers? * How do you plan to address them? |
| Pipeline review: | How has the pipeline changed in the past week?   * New opportunities * Deals progressed * Overall pipeline health |
| Closed deal review: | Have any deals closed since the last 1 to 1?   * What was won? * What was lost? * What learnings can you take? (what went well/can be improved?) |
| Stats and figures | Review the previous week’s stats and sales activities:   * [These will vary from team to team and rep to rep.] * [As an example, think about things like activity numbers here.] |
| Action items | What actions need to be taken before the next 1 to 1?   * [As above, these will depend on the meeting’s content.] * [Try to include items whose progress can be tracked next week!] |