

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: <ul style="list-style-type: none">- 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? <ul style="list-style-type: none">- 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? <ul style="list-style-type: none">- New opportunities- Deals progressed- Overall pipeline health

Closed deal review:	Have any deals closed since the last 1 to 1? <ul style="list-style-type: none">- 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: <ul style="list-style-type: none">- [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? <ul style="list-style-type: none">- [As above, these will depend on the meeting's content.]- [Try to include items whose progress can be tracked next week!]