

Weekly Sales Review Worksheet

A template for running more effective weekly sales meetings that focus on continuous improvement. Remember, these reviews should focus on sales activity, not pipeline numbers.

Wins this week

Write down any wins you had this week. This can be anything from getting a hold of a tricky lead to making a time-saving improvement to your process. Try to think beyond your targets.

Actions from last week

Write down actions from last week that helped you reach your goals and wins for this week.

Key numbers

Track your key sales activities numbers. These can include things like prospecting calls made, leads generate, opportunities created, new clients or any other important activity metric.

Stuck deals and barriers

Write down any deals that are stuck and any barriers to moving them forward.

Learnings this week

Identify anything you've learned this week, both for yourself and things that will help the team.

Top 3 priorities for your week

Write down your top priorities for next week.

1. _____
2. _____
3. _____

Actions next week

Identify any actions you can take that will help you complete your top priorities for next week.

Support you need

Write down anything you may need help with to complete your priorities next week.
