PUT THE FOUR STEPS TO WORK

Your weekly sales review

Use one review period and one group of prospects. Write what happened before choosing the change.

- [ ] My counts use clear, consistent definitions.
- [ ] I've identified where progress stops.
- [ ] I've checked the explanation against actual work.
- [ ] One change has an owner and a review date.

01 Record what happened

Period, channel and group; attempts / conversations / agreed next steps

What each count includes

Where the notes are

02 Find where it gets stuck

Where progress stops; possible reason to check

More / better / different

Evidence needed

03 Look behind the totals

Buyer's words or observed work; does it support or challenge the idea?

Still unknown

Next question to check

04 Try one useful change

Change to try; what stays the same; evidence to look for

Owner

Review date

Fill in digitally or print. Check each box when that part is ready.