TAILWIND FIELD GUIDES

Find what's slowing your prospecting.

Four steps to review your week, find where progress stops, and choose one useful change.

4 steps | 7 minute read Includes a practical worksheet

Erik Meier, founder and CEO of EAM Consulting Group, coaches sales teams. Dan Stalp co-owned a benefits brokerage before running a Sandler training business. Their advice tackles a familiar problem: you've had a busy week, but prospecting isn't moving. Do you need more activity, a better conversation, or a different approach?

In this guide, we draw on our interviews with these two sales pros to walk through a prospecting review in four practical steps. You'll look behind the activity totals, check what actually happened, and choose a change worth trying.

Read on, then use the accompanying worksheet to review your own week. You'll have a clear record of the work, a problem to investigate, and one change with an owner and a review date.

01 Record what happened
02 Find where it gets stuck
03 Look behind the totals
04 Try one useful change

01 Start with the work you can see.

Dan has heard the objection: we'll track this once the CRM is sorted out. He starts smaller. A few honest counts can show where the work is going, even while the tools are catching up.

> "you can form the habit with pencil and paper."
>
> **Dan Stalp**
> President, Sandler Training Overland Park Kansas City

For a call review, count each dial as an attempt, a two-way exchange with a prospect as a conversation, and a next step only when both sides agree on an action and timing. A voicemail isn't a conversation.

Choose one period, channel, and customer group. Keep them separate from other activity so the counts are comparable. A founding AE and founder can then inspect the same work instead of arguing over what "busy" means.

Watch Dan start the habit before the CRM is perfect ↗

He explains why waiting for the right tool can delay a simple record of what actually happened.

From Topsail's interview with Dan Stalp
57 seconds · Opens on YouTube at 5:42; watch to 6:39.

Bring three counts and a few notes

- Write the review period, group, and definitions; record attempts, conversations, and agreed next steps.
- Keep the reasons behind the outcomes: wrong role, no current problem, useful conversation, or something still unknown.

You're ready when: You can explain what the numbers include and point to the work behind them.

02 Choose the right problem to solve.

Erik asks whether the work needs more, better, or different. You may need more useful attempts, a stronger message or conversation, or a different target. Check the plan as well as its execution. Start where progress seems to stop; the counts suggest a question, not a proven cause.

> “Sometimes it is more, but sometimes just better and sometimes it’s different, right?”
>
> **Erik Meier**
> Founder and CEO, EAM Consulting Group

More	Better	Different
Too few useful attempts. Check the target, capacity, and whether the work happened.	The message or conversation isn’t landing. Review the actual outreach and response.	The people or problem don’t fit. Revisit the target or approach.

Watch Erik explain more, better, or different ↗

Before turning up the activity target, hear the distinctions he uses to diagnose a weak funnel.

From Topsail’s interview with Erik Meier
43 seconds · Opens on YouTube at 2:20; watch to 3:03.

Name a working explanation

- Choose the part of the process that seems stuck.
- Write one possible reason and the evidence you need to check it.

You’re ready when: You have a question to investigate, rather than a verdict about your ability.

03 Read the notes before changing the plan.

Dan uses the gaps between attempts, conversations, and meetings to decide where coaching might help. The count points you toward the question. The actual work helps you answer it.

WORKED EXAMPLE

The calls happened. Check who owns the problem.

Imagine one week of 40 first calls to 40 people in one segment. Thirty-two go to voicemail. Of eight conversations, six point to another department. Two people describe a relevant problem; one agrees to a follow-up, the other has no reason to act now.

40	8	1
first calls	conversations	agreed next step

Check the six referrals before changing the message. Compare the roles they name with the people involved in your customer wins. If they point to the same role, that gives you a target to try. If you have no wins yet, check who owns the issue in the next conversations.

Fictional example, not a benchmark or customer result. Eight conversations justify a closer look; they don't prove the whole market is wrong.

Watch Dan use the numbers to ask a better question ↗

He shows how response and qualification patterns can lead to specific coaching conversations.

From Topsail's interview with Dan Stalp

1 minute 1 second · Opens on YouTube at 20:33; watch to 21:34.

Check one explanation against real work

- Read the notes or review an appropriately recorded conversation at the point where progress stops.
- Separate what the buyer actually said from what you assumed.

You're ready when: You can connect the proposed change to an observed problem.

04 Give the next week a clear job.

Erik says a shared process helps show what needs changing. Keep enough steady to learn from the adjustment. Changing audience, message, and channel together makes the result harder to explain.

For the example, Alex will call ten people in the role the six notes point to, at similar companies. Keep the message and channel steady. Review on Friday: do these people own the problem? If the wrong-role pattern continues, revisit the target; if it changes, keep checking before expanding.

Dan reminds us that sales arrive unevenly. Review the work weekly, but judge sales over a period that fits your sales cycle.

Watch Dan separate consistent work from uneven results ↗

He explains why a steady prospecting routine can still produce lumpy sales.

From Topsail's interview with Dan Stalp

48 seconds · Opens on YouTube at 18:38; watch to 19:26.

Write a small test you can review

- Write the change, what stays the same, and who will make it.
- Set a review date, the evidence you'll inspect, and what you'll do if it supports or challenges the idea.

You're ready when: You have one test with an owner, date, and decision to make.

Know what to change next?

Use these four checks before rewriting the whole plan.

Before you start

- [ ] 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.

Download the worksheet ↓

One-page, fillable PDF · No email required

If the obstacle is preparing contacts and keeping the daily work organized, **take a look at Topsail ONE**. We prepare the contacts and next steps around your approach. You bring the judgment and have the conversations.

THE CONVERSATIONS BEHIND THE GUIDE

Keep listening with Tailwind.

Tailwind brings the conversations and expertise. Field Guides turn those insights into practical resources you can use.

Dan Stalp

Use Activity Data to Set a Realistic Daily Sales Plan

Erik Meier

Does Your Pipeline Need More Activity—or a Different Approach?