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Weekly Sales Management Rhythm Template

The structure your sales rep needs, and the visibility you need as their manager.

Use this template every week. Fill in the rep's name and week at the top of each section. The three touchpoints below, Monday, Wednesday, Friday, take roughly 45 minutes of your week total and give you everything you need to manage a salesperson well.

Rep Name _____	Week Of _____
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MONDAY — Activity Commitment ~5 minutes | Rep submits to manager

Rep fills this out and sends to manager every Monday morning before 9am. Creates weekly accountability without micromanagement.

	Activity	Target this week → Actual at end of week
<input type="checkbox"/>	Outbound calls / outreach <i>Cold + warm combined</i>	Target: _____ Actual: _____
<input type="checkbox"/>	New prospect meetings booked <i>First conversations only</i>	Target: _____ Actual: _____
<input type="checkbox"/>	Proposals / quotes sent <i>Formal proposals out the door</i>	Target: _____ Actual: _____
<input type="checkbox"/>	Follow-ups completed <i>Scheduled follow-ups from prior week</i>	Target: _____ Actual: _____
<input type="checkbox"/>	Pipeline updates in CRM <i>Deals advanced, notes added</i>	Target: _____ Actual: _____

Top 3 priorities this week:

- _____
- _____
- _____



WEDNESDAY — Pipeline Check ~10 minutes | Manager-led

A quick mid-week pulse on deals. Focus on what's moved, what's stalled, and what needs attention before the week closes out.

Deals that advanced this week <i>What moved forward since Monday?</i>	_____
Deals that stalled or went quiet <i>What hasn't moved — and why?</i>	_____
Deals at risk of falling out <i>Any red flags? Anything to address now?</i>	_____
Next steps needed from manager <i>Introductions, approvals, resources?</i>	_____

Total Pipeline Value	# of Active Deals	Projected Close This Month
\$ _____	_____	\$ _____

FRIDAY — Weekly 1:1 + Call Review ~30 minutes | Manager-led

The most important 30 minutes of the management week. Don't skip it. Don't reschedule it unless absolutely necessary.

PART 1 — Week in Review 10 minutes

What went well this week? <i>Let the rep lead — then add your observations.</i>	_____
What didn't go as planned? <i>Deals lost, calls that didn't land, activity missed.</i>	_____
Activity vs. commitment <i>Did they hit their Monday targets? What's the gap?</i>	_____
One thing to do differently next week <i>Specific and actionable — not vague.</i>	_____



PART 2 — Pipeline Review

10 minutes

Top 3 deals to close in next 30 days <i>Name them. What's the next step on each?</i>	<hr/> <hr/> <hr/>
Deals to cut from pipeline <i>What's been sitting without movement? Kill the dead weight.</i>	<hr/> <hr/>
New opportunities added this week <i>Where are they in the process?</i>	<hr/> <hr/>

PART 3 — Call Review

10 minutes

Review 2–3 calls from this week. Listen together or have the rep recap. Focus on specific moments — not general impressions.

Call reviewed (prospect/company)	<hr/> <hr/>
What the rep did well <i>Be specific — cite the moment in the call.</i>	<hr/> <hr/>
What to do differently <i>One thing. Specific. Repeatable.</i>	<hr/> <hr/>
Call reviewed (prospect/company)	<hr/> <hr/>
What the rep did well <i>Be specific — cite the moment in the call.</i>	<hr/> <hr/>
What to do differently <i>One thing. Specific. Repeatable.</i>	<hr/> <hr/>



PART 4 — Next Week Setup

5 minutes

Rep's #1 focus next week <i>One clear priority — not a list.</i>	<hr/>
Manager commitments to rep <i>What do YOU need to do to unblock them?</i>	<hr/>
Any upcoming deals needing prep <i>Proposals, presentations, key follow-ups?</i>	<hr/>

MANAGER NOTES — Patterns & Trends

Track these week over week to spot issues before they become problems

Coaching themes this week <i>Patterns you're seeing across calls and pipeline</i>	Performance trend (vs. last week) <i>Improving / Holding steady / Declining + why</i>
<hr/>	<hr/>
On track for monthly quota? <input type="checkbox"/> Yes <input type="checkbox"/> At risk <input type="checkbox"/> Behind	If behind — what's the plan? <hr/>

Need help building the management habits that stick?

Sales Homie coaches founders and business owners through exactly this, the weekly rhythms, call review frameworks, and performance conversations that make sales hires work.

If you're managing a rep for the first time, you don't have to figure it out alone.

www.saleshomie.com | contact@saleshomie.com