



VP Sales & Sales Manager 1:1 Template

The template below offers one potential agenda for VP Sales and CROs to use with line sales managers during their 1:1s. This document lays out key topics that may need to be covered, several examples of the types of questions that might need to be answered as a part of each agenda topic, and some supporting data that may be needed to answer those questions.

The goal here is to provide a structure that you can customize to make applicable to the managers and teams that you oversee. Once you've customized this template to your needs, and you know supporting data that will be most helpful for your own 1:1s, you may want to work with your sales ops counterparts to create a dashboard that you can add to your recurring meeting invites and review in preparation for your manager 1:1s, such that the conversation will be as productive as possible and focused on coaching and problem-solving instead of information-sharing.

AGENDA ITEM	QUESTIONS TO BE ANSWERED	SUPPORTING DATA
Follow-up from last week	<p>What actions did we agree to take last week?</p> <p>What is the status of those actions?</p> <p>Are there any items where we were waiting on an external blocker, and if so has that blocker been removed?</p>	
Forecasting and pipeline	<p>What is our forecast for the full quarter? What is that in attainment percentage?</p> <p>What have we booked quarter-to-date?</p> <p>Which are the largest deals that might swing the forecast? Do you need any help from me on those?</p> <p>Do we have any major customers at risk of churn? Are there any actions I need to take</p>	<p>Quarter-to-date bookings</p> <p>Quarterly Forecast</p> <p>Quarterly Plan</p> <p>Open deals by amount</p> <p>Customers renewing this quarter with poor account health</p>

	<i>against those?</i>	
Deals and competitors	<i>Did we win or lose any major deals since our last 1:1 that we should discuss?</i>	Closed Won opps Closed Lost opps
	<i>Are we seeing any new competitors in open or recently closed deals or any new messaging from existing competitors?</i>	Closed Lost reasons
Team staffing and performance	<i>Do we have any open headcount? If so, what does our hiring pipeline look like?</i>	Quarter-to-date bookings by rep Quarterly forecast by rep
	<i>Do we have any reps at risk of attrition? If so, do we have a plan to mitigate that risk?</i>	Quarterly quota by rep
	<i>What does rep-level attainment to quota currently look like? Are any reps on a Performance Improvement Plan? If so, how are they performing against that plan?</i>	
	<i>Are any reps struggling? Are any of these not showing performance improvement after coaching and at risk of being put on a PIP? What coaching steps are we taking?</i>	
	<i>How is team morale? Are there any specific concerns or blockers that we need to address?</i>	
Manager concerns and professional development	<i>What does the manager of this team need you to know as the VP that isn't covered by the above?</i>	
	<i>Does the manager have any feedback for you as the leader of the sales organization?</i>	
	<i>What are the manager's professional development priorities, and how are those being addressed?</i>	

	<i>Are there any actions the VP needs to take to promote the manager's professional development?</i>	
General comms	<i>Is there any general information about the organization that needs to be pre-wired in advance of a general announcement or discussed privately?</i>	
Next steps		
