Sales Manager & Rep 1:1 Template

The templates below offers one potential agenda for sales manager to use with their reps during weekly 1:1s. This document lays out a suggested set of key topics that may need to be covered for different types of reps, 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 reps 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 1:1s, such that the conversation will be as productive as possible and focused on coaching and problem-solving instead of information-sharing.

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AE Example

AGENDA ITEM	QUESTIONS TO BE ANSWERED	SUPPORTING DATA
Follow-up from last week	*What actions did we agree to take last week? What is the status of those actions? Are there any items where we were waiting on an external blocker, and if so has that blocker been removed?*	
Pipeline review	*Which deals look like they might be going sideways?*	Untouched Opps Stuck Opps Opportunity Age Days Between Opp Touches Email Engagement Rate
	Which deals have progressed?	Opps Advanced
	What new opportunities have been created?	New Opportunities
	What does overall pipeline look like compared to peers?	Total Pipeline Total Open Opportunity Count
Closed deals review	*What deals have closed since our last 1:1?*	Opportunities Closed Won Opportunities Closed Lost
	Are there learnings from the won opportunities that we can share during our team meeting? What about opportunities that we lost? Do any closed opps warrant a postmortem deep-dive?	
Sales activities review	*What actions are you taking to progress deals down the pipeline?*	Total Meetings Last Week Total Meetings This Week

	Is effort being directed up-funnel, down-funnel, or both?	Follow-Up Meeting Ratio
	What prospecting activity are you doing? Is this is line with expectations?	Accounts Touched
Rep concerns	*What do you need from me, as your manager, outside of the specific deal blockers identified during pipeline review?*	
General comms	*Is there anything else you need to know that can't wait for the team meeting, or isn't relevant to the entire team?*	
Next steps	*What needs to be done? Who will do it? By when?*	

SDR Example

AGENDA ITEM	QUESTIONS TO BE ANSWERED	SUPPORTING DATA
Follow-up from last week	*What actions did we agree to take last week? What is the status of those actions? Are there any items where we were waiting on an external blocker, and if so has that blocker been removed?*	
Prospecting list review	*Which / how many accounts are currently in an active outreach sequence? What is the breadth of sales activities taking place?*	Accounts Touched
	Who are we attempting to contact at those accounts? What is the depth of sales activities taking place?	Contacts per Account
	Which accounts have we actually connected with? How responsive are they being?	Call Connects Email Engagement Rate
	Which accounts have we been able to schedule meetings with?	Meetings
	What is the efficiency of our sales activities?	Sales Touches per Meeting Meetings per SAO
SAOs submitted review	*What SAOs were submitted to AEs since our last review?*	Opportunities Submitted Opportunities Accepted SAOs Acceptance Rate
	Are there learnings from the accepted opportunities that we can share during our team meeting? What about rejected opportunities? Do any rejected opps warrant a postmortem deep-dive?	
Sales activities	*What actions are you taking to generate meetings?*	Emails

review

Calls

Rep concerns	*What do you need from me, as your manager, outside of the specific deal blockers identified during pipeline review?*
General comms	*Is there anything else you need to know that can't wait for the team meeting, or isn't relevant to the entire team?*
Next steps	*What needs to be done? Who will do it? By when?*

[Other Atrium Performance Resources]

Account Manager Example

AGENDA ITEM	QUESTIONS TO BE ANSWERED	SUPPORTING DATA
Follow-up from last week	*What actions did we agree to take last week? What is the status of those actions? Are there any items where we were waiting on an external blocker, and if so has that blocker been removed?*	
Pipeline review	*Which deals look like they might be going sideways?*	Untouched Opps within 90 days of renewal date Email Engagement Rate
	Which deals have progressed?	Opps Advanced
	What upsell opportunities have been created?	New Opportunities
	What does overall account load look like compared to peers?	Total Accounts Owned Total Open Opportunity Count
Closed deals review	*What deals have closed since our last 1:1?*	Opportunities Closed Won Opportunities Closed Lost
	Are there learnings from the won opportunities - renewals or add-ons - that we can share during our team meeting? What about opportunities that churned? Do any closed opps warrant a postmortem deep-dive?	Customer Logo Retention Rate Net Dollar Retention Rate
Sales activities review	*What actions are you taking to progress deals down the pipeline?*	Total Meetings Last Week Total Meetings This Week

	Is effort being directed towards newly-passed accounts from the AE team, previously held customer accounts, or both?	Follow-Up Meeting Ratio
	What percentage of your book of business have you interacted with this month? What depth of engagement do you have at each customer?	Accounts Touched Contacts per Account
Rep concerns	*What do you need from me, as your manager, outside of the specific deal blockers identified during pipeline review?*	
General comms	*Is there anything else you need to know that can't wait for the team meeting, or isn't relevant to the entire team?*	
Next steps	*What needs to be done? Who will do it? By when?*	