



**Sales Manager
Monthly Coaching and Review**

| | | | | | | | | | | |
|---------------|----------|-------------|---------------|--------------|----------------------|------------------|------------------|-----------------|------------------------|------------------|
| Date: | SALES | % VAR LY | % VAR GOAL | AVG SALE | TRANS +/- LY | CREDIT % | TEAM SALES \$ | TEAM SALES # | IPR | # OF CONTACTS |
| Month to Date | | | | | | | | | | |
| Year to Date | | | | | | | | | | |
| | GP \$ | GP % | EMAIL % | CLOSING % | REQUESTS/ REVIEWS | % MONTHS MADE | BIRTHDAY % | ANNUAL % | % OF ASSOC HIT GOAL | |
| Month to Date | | | | | | | | | | |
| Year to Date | | | | | | | | | | |

| CATEGORIES | MANAGER SCORING | SUPERVISOR SCORING | COMMENTS |
|----------------------------|--------------------|-----------------------|----------|
| Managing People & OT | | | |
| Problem Solving | | | |
| Planning & Organization | | | |
| Leadership | | | |
| Delegation | | | |
| Staffing | | | |
| Training | | | |
| Customer Service | | | |
| Initiative/Awareness | | | |
| Team Building | | | |
| Clientelling | | | |
| Analysis & Action Planning | | | |

ACTION PLAN - HOW MUCH AND BY WHEN

WHAT - What are the two (2) high leverage categories within the selling process that will improve over the next 30 days?

1. _____ 2. _____

HOW - What specific actions and/or development are required?

1. _____

2. _____

WHEN - When will the individual complete the "How" assignment?

1. _____ 2. _____

HOW MUCH - What improvement (outcome) is expected over the next 30 days?

Other Comments: _____

This Month's Goals

| Sales | Avg Sale | Credit % | TO % | IPR | # Contacts | GP % | Email % | Closing % | Reviews/ Requests | Bday % | Anniv % | % Assoc Goal | Supervisor Initial/Date | Manager Initial/Date |
|-------|----------|----------|------|-----|------------|------|---------|-----------|-------------------|--------|---------|--------------|-------------------------|----------------------|
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| Follow-up Date | |
|----------------|--|