



Sales Manager
EF'nG Coaching and Review

for the month of _____

Date:	SALES ACTUAL	SALES PLAN	\$/% +/- PLAN	GROSS PROFIT \$ +/- PLAN	APPOINTMENTS SHOWN	APPS TAKEN +/- PLAN
Month to Date						
Year to Date						
	CREDIT % TOTAL SALES	AVERAGE TRANSACTIONS	TO %	CUSTOMER CONTACTS	OPPORTUNITIES SET	ASSOCIATES TO HIT GOAL
Month to Date						
Year to Date						

CATEGORIES	MANAGER SCORING	SUPERVISOR SCORING	COMMENTS
Hustle			
Work as a team to help others celebrate			
Building Trust			
Personal Effectiveness			
Performance Management			
Effective Decision Making			
Event Prep/Execution			
Follow up/Follow through			
8 Steps of Selling			
Action Planning			
Core Values			
Quarterly Focus			

7 Performance Factors

1. Skill/Knowledge 2. Capacity 3. Resources 4. Feedback 5. Internal Motivation 6. Consequences 7. Clear Expectations

ACTION PLAN - HOW MUCH AND BY WHEN	
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WHAT - What are the two (2) high leverage activities that will improve over the next 30 days?

1. _____ 2. _____

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

WHEN - When will the individual complete the “How” assignment?

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

Other Comments:_____

[illegible]