Checklist 1:1 with Sales Reps (transactional sales model)
Status: 27. November 2017
Authors: Jens Hutzschenreuter

- Typical structure (duration: 30 min)
    a. 10 min: for the rep (rep's time)
    b. 10 min: for the manager (2)
    c. 10 min: looking into the future (3)
- Key questions for the manager (2)
    a. Was last week a good or a bad week for you? Why? (let them speak)
    b. **(Step 1)** Review performance tracking sheet
    (Link: add URL)
        - Where do you stand today in your quota attainment?
        - What will be the gap at the end of the month, given your current bookings?
        - → See also preparation doc for reps 1:1
    c. **(Step 2)** Discuss individual's activity KPIs first
    (Link: add URL)
        - # demos booked - (discuss performance vs. standard of 3 per day)
        - # demos run - (discuss performance vs. standard of 2 per day)
        - # seats / licenses in demos run
        - % to goal in month & campaign
    d. **(Step 3)** KPI-based Coaching // Review individual KPIs vs. peer group weekly
    (Link: add URL)
        - Determine coaching topic and focus on one topic only (!)
        - Discuss the training needs with individual
        - Hand-out coaching tracking sheet (see end of this document) to individual + review sheet of last week
        - Document results in managers spreadsheet (to keep track of topics)
    e. **(Step 4)** Review pipeline together with Sales Rep (Link: add URL)
        - Stage 3 (late sales process stage: e.g., offers sent, but not signed yet):
            - Status by customer, rep walks manager through the list
        - Stage 2 (medium sales process stage: e.g., project defined, no offer sent yet):
            - What is holding us up to send an offer?
        - Stage 1 (early sales process stage: (e.g., demos scheduled in the past):
            - Discuss how to get the customer interested
    f. **(Step 5)** CRM data clean-up / Wall-of-shame: Where do we stand? How many open activities do you have?
    (Link: add URL)
- Looking into the future (3)
    a. How are things going? Are you happy with your work right now?
    b. Where can I (as a manager) help?
    c. Where do you see a need for additional training?

- Training: review KPIs of each individual deal stage and define training needs

How to prepare for a 1:1 with your sales manager
<u>Status: 27. March 2019</u>
Authors: Jens Hutzschenreuter

- For your reps: Prepare this information for your 1:1 meeting with your manager
    a. **What is your quota attainment in for the current month right now?**
    (in $ and in %, from Personal Dashboard)
    b. **How many demos do you still have open for this month?**
    (in # licenses, from Personal Dashboard)
    c. **What is your current conversion rate (this month)**
    (in %, = fully loaded conversion rate last 4 weeks, from CRM)
    d. **What is the projected outcome of your currently scheduled demos (based on your current conversion rate from c.)?**
    (in €, demos scheduled * fully loaded conversion rate of last 4 weeks)
    e. **How large is the gap between monthly quota and projected outcome?**
    (in €, = monthly quota ./. (current quota attainment + demos scheduled * current conversion rate))
    f. **How many # licenses do you need to close the gap this month?**
    (in #, gap in # = gap in € / xx€ p.a.)
    g. **How many demos do you need to book to get to 100% quota attainment?**
    (in #, = gap in # / fully loaded conversion rate last 4 weeks in %)

Comment: Example is for a transactional sales model, please adjust for midmarket / enterprise sales models