

Sales One-on-one Session Notes

Sales Person: _____	Date: _____	Time: _____
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One-on-one Session Notes

Opening
(Personal items)

Sales Person's Update
(What's going on with territory, projects, proposals, sales, clients, etc.)

Manager's Update
(What's going on within the company, customer issues, sales metric, proposals, etc.)

Follow-Up
(Action items and time line)

Manager: _____

Sales Person: _____
