

Monthly 1-on-1

Results

Discuss year-to-date, previous quarter, and previous month results. Share the rep's ranking on the team.

Funnel Review

New opportunities added since last review & potential revenue:

Existing opportunities that have moved forward since our previous discussion:

Opportunities forecasted to close vs. plan

Customer	Most recent customer action	Why we'll win	Potential revenue	Probability of success

Agreed-upon next steps: