



Weekly Planning for Sales (Friday Close + Monday Setup)

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Printable, two-page template for B2B reps and new managers. Use it to protect pipeline time, force next steps with dates, and stop follow ups from slipping.

How to use (30–60 min weekly → proactive week)

- Friday Close: protect pipeline time, then force next step + owner + date on every active deal.
- Monday Setup: lock your Top 3 outcomes, prep the meetings that move revenue, then execute your Top 5 follow ups.
- Daily (2 min): check the Scoreboard, pick the next action for the biggest gap, schedule it.

Friday Close (20–40 min) - Checklist

Hard rule: no owner + no date = not a deal.

- Protect pipeline time for next week:
 - Pipeline Block booked (60–90 min)
 - Proposal/Quote Block booked (45–60 min)
- Audit deals (next step + owner + date):
 - Every active deal has a next step
 - Every active deal has an owner (me / customer / internal)
 - Every active deal has a date (calendar, not “soon”)
- Flag risks (quick tags):
 - No response 7+ days
 - Decision maker not confirmed
 - Timeline not agreed
 - Internal dependency unowned (pricing / delivery / legal)
- Write Monday hit list:

- Top 3 outcomes for next week (outcomes, not tasks)
- Top 5 follow ups that unblock deals

Monday Setup (20–30 min) - Checklist

- Re-lock protected blocks:
 - Pipeline Block is still on the calendar
 - Proposal/Quote Block is still on the calendar
- Pick Top 3 outcomes:
 - 1) _____
 - 2) _____
 - 3) _____
- Build the execution list:
 - Top 5 follow ups that unblock deals (send today)
 - Any deal missing a date gets fixed today
- Prep the meetings that matter:
 - Objective
 - Key question(s)
 - Next step you want + date
- Set the follow up standard:
 - Recap within 24 hours
 - Next step includes owner + date

When your week breaks by Tuesday (10–20 min) - Reset

- Triage (3 min): one must-win outcome, two deals you refuse to let stall, one blocker you must remove.
- Rebuild (5 min): re-lock one Pipeline Block in the next 48 hours (move meetings if needed).



- Rescue (5–10 min): send Top 5 unblock follow ups (one clear question + two time options).
- Fix meeting output (2 min): write the next step you want and the date before each key call.



Weekly Sales Scoreboard (5 numbers)

- Update weekly. Review daily in 2 minutes.
- Rule: a gap with no next action is just reporting. Pick one action per gap and schedule it in your Pipeline Block.

Metric	Target	Actual	Gap	Next action
New qualified meetings booked	___	___	___	_____
Follow ups sent to unblock deals	___	___	___	_____
Proposals/quotes sent	___	___	___	_____
Next steps confirmed with a date	___	___	___	_____
Pipeline coverage (60–90 days)	___	___	___	_____

Next action rules (keep it simple)

- One action per gap. If you pick three, you will do none.
- If it is not scheduled, it will not happen. Put it into your Pipeline Block.
- If a deal has no date, your next action is to get the date (or downgrade the deal).