



Days 1-7 / Understand the work

Aim for one agreed priority, clear decisions and a first view of the team's obstacles.

Count 30 calendar days from your start date. Swap activity and rest prompts to fit your working week, and write your own dates in the daily blocks.

☐ Day 1 Agree on the first-month priority

Ask the owner which result matters, what you can decide and what evidence to review on day 30.

Result: One priority, the current position and a review date.

☐ Day 2 Clarify decisions and commitments

List urgent buyer promises and decisions you can make or must escalate.

Result: Each urgent item has an owner and a due date.

Weekly review

Done

Stuck

Carry forward

Bright ideas

☐ Day 3 Listen to the reps

Ask each person where work gets stuck and what help they need. Continue these chats across the week if needed.

Result: One obstacle and one agreed follow-up per rep.

☐ Day 4 Trace two real deals

Read one won and one lost deal with a rep, or two active deals if none have closed. Mark missing evidence as unknown.

Result: One issue to inspect; two deals do not establish a pattern.

☐ Day 5 Give the team a short plan

Share the priority, decisions and follow-ups. Ask what you have missed.

Result: One note the team can refer to, with owners and dates.

☐ Day 6 Optional review or rest

Rest, or note one open question.

☐ Day 7 Optional reset or rest

Rest, or choose your next starting point.

Three priorities a day

Day 1

Weekday / date

1 _____

2 _____

3 _____

Day 2

Weekday / date

1 _____

2 _____

3 _____

Day 3

Weekday / date

1 _____

2 _____

3 _____

Day 4

Weekday / date

1 _____

2 _____

3 _____

Day 5

Weekday / date

1 _____

2 _____

3 _____

Day 6

Weekday / date

1 _____

2 _____

3 _____

Day 7

Weekday / date

1 _____

2 _____

3 _____



Weekly time planner

Week of _____

Use with the front of this sheet. Add your weekdays and dates; write only the commitments you choose.

Time	Day 1 Weekday / date	Day 2 Weekday / date	Day 3 Weekday / date	Day 4 Weekday / date	Day 5 Weekday / date	Day 6 Weekday / date	Day 7 Weekday / date
08:00	08:00 _____	08:00 _____	08:00 _____	08:00 _____	08:00 _____	08:00 _____	08:00 _____
09:00	09:00 _____	09:00 _____	09:00 _____	09:00 _____	09:00 _____	09:00 _____	09:00 _____
10:00	10:00 _____	10:00 _____	10:00 _____	10:00 _____	10:00 _____	10:00 _____	10:00 _____
11:00	11:00 _____	11:00 _____	11:00 _____	11:00 _____	11:00 _____	11:00 _____	11:00 _____
12:00	12:00 _____	12:00 _____	12:00 _____	12:00 _____	12:00 _____	12:00 _____	12:00 _____
13:00	13:00 _____	13:00 _____	13:00 _____	13:00 _____	13:00 _____	13:00 _____	13:00 _____
14:00	14:00 _____	14:00 _____	14:00 _____	14:00 _____	14:00 _____	14:00 _____	14:00 _____
15:00	15:00 _____	15:00 _____	15:00 _____	15:00 _____	15:00 _____	15:00 _____	15:00 _____
16:00	16:00 _____	16:00 _____	16:00 _____	16:00 _____	16:00 _____	16:00 _____	16:00 _____
17:00	17:00 _____	17:00 _____	17:00 _____	17:00 _____	17:00 _____	17:00 _____	17:00 _____
18:00	18:00 _____	18:00 _____	18:00 _____	18:00 _____	18:00 _____	18:00 _____	18:00 _____
19:00	19:00 _____	19:00 _____	19:00 _____	19:00 _____	19:00 _____	19:00 _____	19:00 _____
20:00	20:00 _____	20:00 _____	20:00 _____	20:00 _____	20:00 _____	20:00 _____	20:00 _____



Days 8-14 / Make follow-up visible

Aim to see who owns each sampled lead, what happens next and when.

☐ Day 8 Choose a small, useful sample

Save up to 10 active lead IDs, mixing recent and older buyer activity. If none exist, list current enquiries with the team; start the check when a live opportunity appears.

Result: A dated sample to recheck; count each opportunity once.

☐ Day 9 Inspect the next step

In your CRM or sheet, record each sampled lead's owner, next action and due date. Note whether the buyer agreed where relevant.

Result: A visible list of missing owners, vague steps and missing or overdue dates.

☐ Day 10 Repair the gaps together

Ask the responsible rep to agree a repair action and date. Mark a proposed next step unconfirmed until the buyer agrees to it. Record why a due date changes.

Result: Each gap has a person who will resolve it and a date.

Make the check easy to repeat

Track Lead ID / Rep / Next step / Due date / Gap; mark missing dates unknown and recheck the sample on day 22.

Bright ideas

☐ Day 11 Check what a stage means

Choose one stage people interpret differently. Agree what buyer evidence is needed to enter or leave it.

Result: One plain-language stage rule with a real record to discuss.

☐ Day 12 Set the active-record standard

Agree one accountable rep, a specific next action and a due date for every active lead. Review inactive records before removing them.

Result: One shared rule; closed or inactive records have a recorded reason.

☐ Day 13 Optional review or rest

Rest, or note one repair still needing help.

☐ Day 14 Optional reset or rest

Rest, or choose the next decision to make.

Weekly review

Done / stuck / carry forward: which repairs have evidence, which need a decision, and who will act next?

Three priorities a day

Day 8 Weekday / date _____

- 1 _____
- 2 _____
- 3 _____

Day 9 Weekday / date _____

- 1 _____
- 2 _____
- 3 _____

Day 10 Weekday / date _____

- 1 _____
- 2 _____
- 3 _____

Day 11 Weekday / date _____

- 1 _____
- 2 _____
- 3 _____

Day 12 Weekday / date _____

- 1 _____
- 2 _____
- 3 _____

Day 13 Weekday / date _____

- 1 _____
- 2 _____
- 3 _____

Day 14 Weekday / date _____

- 1 _____
- 2 _____
- 3 _____



Weekly time planner

Week of _____

Use with the front of this sheet. Add your weekdays and dates; write only the commitments you choose.

Time	Day 8 Weekday / date	Day 9 Weekday / date	Day 10 Weekday / date	Day 11 Weekday / date	Day 12 Weekday / date	Day 13 Weekday / date	Day 14 Weekday / date
08:00	08:00 _____	08:00 _____	08:00 _____	08:00 _____	08:00 _____	08:00 _____	08:00 _____
09:00	09:00 _____	09:00 _____	09:00 _____	09:00 _____	09:00 _____	09:00 _____	09:00 _____
10:00	10:00 _____	10:00 _____	10:00 _____	10:00 _____	10:00 _____	10:00 _____	10:00 _____
11:00	11:00 _____	11:00 _____	11:00 _____	11:00 _____	11:00 _____	11:00 _____	11:00 _____
12:00	12:00 _____	12:00 _____	12:00 _____	12:00 _____	12:00 _____	12:00 _____	12:00 _____
13:00	13:00 _____	13:00 _____	13:00 _____	13:00 _____	13:00 _____	13:00 _____	13:00 _____
14:00	14:00 _____	14:00 _____	14:00 _____	14:00 _____	14:00 _____	14:00 _____	14:00 _____
15:00	15:00 _____	15:00 _____	15:00 _____	15:00 _____	15:00 _____	15:00 _____	15:00 _____
16:00	16:00 _____	16:00 _____	16:00 _____	16:00 _____	16:00 _____	16:00 _____	16:00 _____
17:00	17:00 _____	17:00 _____	17:00 _____	17:00 _____	17:00 _____	17:00 _____	17:00 _____
18:00	18:00 _____	18:00 _____	18:00 _____	18:00 _____	18:00 _____	18:00 _____	18:00 _____
19:00	19:00 _____	19:00 _____	19:00 _____	19:00 _____	19:00 _____	19:00 _____	19:00 _____
20:00	20:00 _____	20:00 _____	20:00 _____	20:00 _____	20:00 _____	20:00 _____	20:00 _____



Days 15-21 / Build a useful weekly rhythm

Aim for team decisions, individual help and a reliable place to record commitments.

☐ Day 15 Run a focused pipeline review

Ask reps to update their records before the meeting. Spend 5 minutes on open commitments, 20 on selected deals and 5 reading back decisions. Split the session if needed.

Result: Each decision has an action, owner and due date.

☐ Day 16 Make room for individual help

Start a short one-to-one with each rep; spread them over available workdays. Ask them to bring one deal or task where help would matter.

Result: One useful coaching focus per person, with your support recorded.

☐ Day 17 Look at the actual work

With a rep, read an available call note, email or proposal related to that focus. Ask what the buyer did or said.

Result: A specific behavior to discuss, grounded in evidence.

Keep the two conversations distinct

The team review handles deal decisions and shared commitments. The one-to-one gives a rep time for individual coaching and support. For each, finish by reading back what happens next, who owns it and when you will return to it.

Bright ideas

☐ Day 18 Practice one small change

Rehearse one question, explanation or next-step request. Agree when the rep will try it and what you will review.

Result: A practice action and review date, rather than a general instruction.

☐ Day 19 Close the loop on commitments

Review promised help, update stuck actions and set the next four team-review dates. Agree preparation and where decisions are kept.

Result: A shared calendar and one short preparation note.

☐ Day 20 Optional review or rest

Rest, or note one promise you still owe.

☐ Day 21 Optional reset or rest

Rest, or choose one routine to simplify.

Weekly review

Done / stuck / carry forward: did decisions move, did reps receive promised help, and does everyone know what to prepare next?

Three priorities a day

Day 15 Weekday / date _____

1 _____
2 _____
3 _____

Day 16 Weekday / date _____

1 _____
2 _____
3 _____

Day 17 Weekday / date _____

1 _____
2 _____
3 _____

Day 18 Weekday / date _____

1 _____
2 _____
3 _____

Day 19 Weekday / date _____

1 _____
2 _____
3 _____

Day 20 Weekday / date _____

1 _____
2 _____
3 _____

Day 21 Weekday / date _____

1 _____
2 _____
3 _____



Weekly time planner

Week of _____

Use with the front of this sheet. Add your weekdays and dates; write only the commitments you choose.

Time	Day 15 Weekday / date	Day 16 Weekday / date	Day 17 Weekday / date	Day 18 Weekday / date	Day 19 Weekday / date	Day 20 Weekday / date	Day 21 Weekday / date
08:00	08:00 _____	08:00 _____	08:00 _____	08:00 _____	08:00 _____	08:00 _____	08:00 _____
09:00	09:00 _____	09:00 _____	09:00 _____	09:00 _____	09:00 _____	09:00 _____	09:00 _____
10:00	10:00 _____	10:00 _____	10:00 _____	10:00 _____	10:00 _____	10:00 _____	10:00 _____
11:00	11:00 _____	11:00 _____	11:00 _____	11:00 _____	11:00 _____	11:00 _____	11:00 _____
12:00	12:00 _____	12:00 _____	12:00 _____	12:00 _____	12:00 _____	12:00 _____	12:00 _____
13:00	13:00 _____	13:00 _____	13:00 _____	13:00 _____	13:00 _____	13:00 _____	13:00 _____
14:00	14:00 _____	14:00 _____	14:00 _____	14:00 _____	14:00 _____	14:00 _____	14:00 _____
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16:00	16:00 _____	16:00 _____	16:00 _____	16:00 _____	16:00 _____	16:00 _____	16:00 _____
17:00	17:00 _____	17:00 _____	17:00 _____	17:00 _____	17:00 _____	17:00 _____	17:00 _____
18:00	18:00 _____	18:00 _____	18:00 _____	18:00 _____	18:00 _____	18:00 _____	18:00 _____
19:00	19:00 _____	19:00 _____	19:00 _____	19:00 _____	19:00 _____	19:00 _____	19:00 _____
20:00	20:00 _____	20:00 _____	20:00 _____	20:00 _____	20:00 _____	20:00 _____	20:00 _____



Days 22-28 / Review the evidence and adjust

Aim for an honest view of what changed and a short list of decisions for the owner.

☐ Day 22 Recheck your original lead sample

Use the saved IDs. Record resolved gaps, remaining gaps and records that closed or left active follow-up. Log new issues separately.

Result: A comparable before-and-after view, with evidence for each repair.

☐ Day 23 Discuss likely outcomes carefully

For deals expected soon, ask what the buyer has confirmed, what remains uncertain and what could change the expected date.

Result: A view of expected business that separates evidence from assumptions.

☐ Day 24 Simplify one handoff

Choose one repeated delay between people or stages. Agree who hands over what, to whom, and by when.

Result: One handoff rule to try on the next relevant record.

Keep the conclusion proportionate

A better record or meeting is useful evidence of a working routine. It does not by itself explain a revenue change. Compare the same sample, show the source of business numbers and say what you still do not know.

Bright ideas

☐ Day 25 Prepare the month review

Bring the original priority, latest sales or pipeline figure from the source agreed with the owner, lead checks and meeting decisions. Mark uncertainty plainly.

Result: A short summary of progress, unresolved issues and decisions needed.

☐ Day 26 Ask what to keep or change

Ask the team which routine helps, which feels repetitive and where decisions still wait. Choose one practical adjustment.

Result: One routine to keep, one to simplify, with a reason for each.

☐ Day 27 Optional review or rest

Rest, or note one decision for the owner.

☐ Day 28 Optional reset or rest

Rest, or confirm the month-review time.

Weekly review

Done / stuck / carry forward: what changed, what still needs support, and which one problem deserves attention next month?

Three priorities a day

Day 22

Weekday / date

1 _____

2 _____

3 _____

Day 23

Weekday / date

1 _____

2 _____

3 _____

Day 24

Weekday / date

1 _____

2 _____

3 _____

Day 25

Weekday / date

1 _____

2 _____

3 _____

Day 26

Weekday / date

1 _____

2 _____

3 _____

Day 27

Weekday / date

1 _____

2 _____

3 _____

Day 28

Weekday / date

1 _____

2 _____

3 _____



Weekly time planner

Week of _____

Use with the front of this sheet. Add your weekdays and dates; write only the commitments you choose.

Time	Day 22 Weekday / date	Day 23 Weekday / date	Day 24 Weekday / date	Day 25 Weekday / date	Day 26 Weekday / date	Day 27 Weekday / date	Day 28 Weekday / date
08:00	08:00 _____	08:00 _____	08:00 _____	08:00 _____	08:00 _____	08:00 _____	08:00 _____
09:00	09:00 _____	09:00 _____	09:00 _____	09:00 _____	09:00 _____	09:00 _____	09:00 _____
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12:00	12:00 _____	12:00 _____	12:00 _____	12:00 _____	12:00 _____	12:00 _____	12:00 _____
13:00	13:00 _____	13:00 _____	13:00 _____	13:00 _____	13:00 _____	13:00 _____	13:00 _____
14:00	14:00 _____	14:00 _____	14:00 _____	14:00 _____	14:00 _____	14:00 _____	14:00 _____
15:00	15:00 _____	15:00 _____	15:00 _____	15:00 _____	15:00 _____	15:00 _____	15:00 _____
16:00	16:00 _____	16:00 _____	16:00 _____	16:00 _____	16:00 _____	16:00 _____	16:00 _____
17:00	17:00 _____	17:00 _____	17:00 _____	17:00 _____	17:00 _____	17:00 _____	17:00 _____
18:00	18:00 _____	18:00 _____	18:00 _____	18:00 _____	18:00 _____	18:00 _____	18:00 _____
19:00	19:00 _____	19:00 _____	19:00 _____	19:00 _____	19:00 _____	19:00 _____	19:00 _____
20:00	20:00 _____	20:00 _____	20:00 _____	20:00 _____	20:00 _____	20:00 _____	20:00 _____



Days 29-30 / Plan the next month

Aim for one next-month priority with an owner, first action and review date.

- ☐ **Day 29 Review the month with the owner**
Compare the original priority with your evidence.
Explain what changed, what remains uncertain and which decision needs the owner's support.

Result: An agreed view of progress and a written decision on the main open issue.

- ☐ **Day 30 Write the next 30-day plan**
Choose one recurring problem. Name the change, its owner, first action and date, and the evidence you will review. Book the next owner review.

Result: One short plan the team can use and a date to revisit it.

Your next month

Priority

First action / owner

Due date / review date

Bright ideas

A five-minute check

Mark yes / no / not yet. A gap points to a decision, not a rating.

Can I state the priority and the evidence we will review?

Do checked leads have owners, next steps and dates?

Have overdue commitments led to a decision?

Did reps receive my promised help or a clear update?

Does the team know the next review and preparation?

Use the reusable weekly pages again after this month. The planner helps you organize decisions and follow-up; it does not promise a revenue result.

The First 30 Days Sales Manager Operating Kit is planned at \$39 USD; it is not available to buy yet. See what's included at new.headofsales.me/first-30-days-kit/.

Three priorities a day

Day 29

Weekday / date

1

2

3

Day 30

Weekday / date

1

2

3

Next month

Weekday / date

1

2

3

Next month

Weekday / date

1

2

3

Next month

Weekday / date

1

2

3

Next month

Weekday / date

1

2

3



Weekly time planner

Week of _____

Use with the front of this sheet. Add your weekdays and dates; write only the commitments you choose.

Time	Day 29 Weekday / date	Day 30 Weekday / date	Next month Weekday / date	Next month Weekday / date	Next month Weekday / date	Next month Weekday / date	Next month Weekday / date
08:00	08:00 _____	08:00 _____	08:00 _____	08:00 _____	08:00 _____	08:00 _____	08:00 _____
09:00	09:00 _____	09:00 _____	09:00 _____	09:00 _____	09:00 _____	09:00 _____	09:00 _____
10:00	10:00 _____	10:00 _____	10:00 _____	10:00 _____	10:00 _____	10:00 _____	10:00 _____
11:00	11:00 _____	11:00 _____	11:00 _____	11:00 _____	11:00 _____	11:00 _____	11:00 _____
12:00	12:00 _____	12:00 _____	12:00 _____	12:00 _____	12:00 _____	12:00 _____	12:00 _____
13:00	13:00 _____	13:00 _____	13:00 _____	13:00 _____	13:00 _____	13:00 _____	13:00 _____
14:00	14:00 _____	14:00 _____	14:00 _____	14:00 _____	14:00 _____	14:00 _____	14:00 _____
15:00	15:00 _____	15:00 _____	15:00 _____	15:00 _____	15:00 _____	15:00 _____	15:00 _____
16:00	16:00 _____	16:00 _____	16:00 _____	16:00 _____	16:00 _____	16:00 _____	16:00 _____
17:00	17:00 _____	17:00 _____	17:00 _____	17:00 _____	17:00 _____	17:00 _____	17:00 _____
18:00	18:00 _____	18:00 _____	18:00 _____	18:00 _____	18:00 _____	18:00 _____	18:00 _____
19:00	19:00 _____	19:00 _____	19:00 _____	19:00 _____	19:00 _____	19:00 _____	19:00 _____
20:00	20:00 _____	20:00 _____	20:00 _____	20:00 _____	20:00 _____	20:00 _____	20:00 _____



Weekly management planner

Review the week, record decisions and plan the next seven days.

Weekly review

Done

What finished, and what evidence shows it?

Stuck

What needs a decision or help?

Carry forward

What still matters next week?

Decisions and follow-up

Decision / agreement

Next action

Owner / due date

Decision / agreement

Next action

Owner / due date

Decision / agreement

Next action

Owner / due date



Meeting notes and follow-up

Record what matters, agree on the next step and decide when to check back.

Date / time _____

With _____

Topic _____

What we discussed

What we agreed

Next step	Owner	Due date
_____	_____	_____
_____	_____	_____
_____	_____	_____

Check back on _____

Date / time _____

With _____

Topic _____

What we discussed

What we agreed

Next step	Owner	Due date
_____	_____	_____
_____	_____	_____
_____	_____	_____

Check back on _____