

# Sales coaching template

This sales coaching template is designed to help you guide and support your team through structured, impactful coaching sessions.

Use it to track progress, ensure alignment on objectives, and provide clear next steps. Whether you're coaching on specific sales tactics or focusing on overall performance, this template will keep your sessions organized and focused on growth.

Just fill in the sections with your insights and action steps, and you'll be ready to make each session count!

---

## Sales coaching template

### 1. Coaching session overview

Coach's name:

Sales rep's name:

Date of the session:

Purpose of the session:

### 2. Sales activity review

Key metrics:

- E.g. Sales calls - [insert number]
- E.g. Average deal size - [insert number]

Qualitative feedback:

- Strengths:
- Areas for improvement

### 3. Goal setting

---

### Goal #1: [Insert goal]

Actionable steps:

- [Insert action step 1] - Deadline: [insert date]
- [Insert action step 2] - Deadline: [insert date]

### Goal #2: [Insert goal]

Actionable steps:

- [Insert action step 1] - Deadline: [insert date]
- [Insert action step 2] - Deadline: [insert date]

### Goal #3: [Insert goal]

Actionable steps:

- [Insert action step 1] - Deadline: [insert date]
- [Insert action step 2] - Deadline: [insert date]

## 4. Practice & role play

Scenario #1: [Insert sales scenario]

- Action plan: [Insert how to handle]
- Feedback/improvement: [Insert key learning points]

Scenario #2: [Insert sales scenario]

- Action plan: [Insert how to handle]
- Feedback/improvement: [Insert key learning points]

## 5. Feedback from sales rep

- What went well last week?
  - What challenges were faced?
-

- 
- What areas need more support?

## 6. Post-session action plan

Immediate actions:

- Action item 1: [Insert action] - Due date: [Insert date]
- Action item 2: [Insert action] - Due date: [Insert date]

Follow-up check-in:

- Set date: [Insert date]

## 7. Resources for development

Sales tools/ software

- [Insert resource name] - [Insert link/resource]

Training material

- [Insert course/material]
- [Insert reading list]

Mentorship opportunities

- [Insert mentorship program or coach name]

## 8. Manager's observations and next steps

Observations

- [Insert key takeaways from the session]

Next steps

- [Insert action items for both manager and sales rep]
-