

Monday Meetings with Sales Manager:	Netsuite Report/Search
I. Present All Numbers	
a. Month to Date Sales per NAM	Sales Order Daily Count - Search
b. Month to Date Shipments NAM	Top Sales Rep This Month 2 - On Dashboard
c. Month to Date GP NAM	Top Sales Rep This Month 2 - On Dashboard
d. Month to Date Leads NAM	On Dashboard - KPI
e. Month to Date Calls	Check Each Persons List to see where they are
f. Month to Date Samples	Keep your own list, or use Wufoo
g. Month to Date Sample Inventory	Updated excel sheet I made
h. Month to Date Mock Up Requests	Keep your own list, or use Wufoo
II. Present Cases	
a. Present all Cases	Lists > Support > Cases
b. Present all solutions for each case	
c. Present time frames for completion	
III. Present Marketing/Flyers	Work on Flyers during week - bring Thurs for approval
a. Ideas for following weeks flyer	
b. Ideas for following weeks script	
c. Ideas for following weeks sale	
IV. Present Shipment Schedule	
a. What is shipping that week	Bring In Shipping Sched. From Previous Week
b. Any issues	
V. Present Order Issues	
a. Any orders having issue getting approved	Open Orders - Dashboard
b. Any orders not going to meet in hands dates	
c. Any orders factory isn't doing well on	
d. Any product issues	
VI. Present National Account Manager Progress	
a. Attendance issues	Attendance Sheet from previous Week
b. Production issues	
c. Not following the script	
d. Not following standard operating procedures	
e. Wasting time	
f. Not being thorough	
g. Who is doing a great job	
h. What rewards can we give	
VII. Present Company Progress Ideas	
a. What can we improve on	
b. What can we exclude	
c. What can we simplify	

To-do list

To be completed by: Sales Manager

Deadline: Each Week

Done?	Monday	Due By	Notes
	Deliver Pricing Flyer	7:30 AM	Make sure Each NAM has flyer and script to send out by 7:30
	Meet With AC	8:00 AM	Talk About Ordes In Process, and ship schedule this week at 8 AM
	Meet With PM	8:30 AM	Talk About Orders In Process, and ship schedule this week at 8:30
	Meet With Gabe	9:00 AM	Go over the items noted in the Monday Meeting itinerary
	Check PI's	10:00 AM	Make sure all PI's are correct and have correct pricing
	Make Ship Sched	10:30 AM	Make a weekly shipment schedule for each NAM
	Lunch	11:00 AM	
	Meet W/ Shawn	12:00 PM	Go over attendance, last week sales, quotes, marketing, calls, goals, ship sched, this week expec.
	Meet W/ Beau	12:30 PM	Go over attendance, last week sales, quotes, marketing, calls, goals, ship sched, this week expec.
	Meet W/ Fidel	1:00 PM	Go over attendance, last week sales, quotes, marketing, calls, goals, ship sched, this week expec.
	Meet W/ Chris	1:30 PM	Go over attendance, last week sales, quotes, marketing, calls, goals, ship sched, this week expec.
	Follow Up	3:15 PM	Make sure each NAM has sent out flyers to VIP's and do mock ups
	Samples	3:15 PM	Make sure All Samples have been shipped and tracking has been sent to client
	Mock Ups	3:15 PM	Make Sure All Mock Ups have been completed

Done?	Tues - Frid	Due By	Notes
	Attendance	7:00 AM	Mark Down Attendance from the previous day
	Check PI's	7:30 AM	Make sure all are PI's are correct and pricing is correct
	Go thru emails	8:00 AM	
	Meet With PM	9:00 AM	Quick Recap
	Meet With AC	9:15 AM	Quick Recap
	Meet With Sales Team	9:30 AM	Quick Huddle to talk about big wins the previous day or losses - anything need help for the day
	Cases	9:45 AM	Work On Cases - Go through and touch base on each case - call or email
	Lunch	11:00 AM	
	Marketing	12:00 PM	Work On Marketing Flyers and Scripts
	Mock Ups	1:00 PM	Get all mock up requests out
	Samples	2:00 PM	Get all samples set up and shipped out
	Follow-up	3:00 PM	Make sure Sales Team did what they needed to do for the day