

FREE WEEKLY REVIEW

THE 15-MINUTE OWNER-LED SALES REVIEW

Find one opportunity.
Repair one repeated breakdown.



OWNER-LED SALES SYSTEM

The 15-Minute Owner-Led Sales Review

Find one opportunity that could quietly slip - and fix one repeated sales breakdown before next week.

FIND

Bring no more than three exceptions: an opportunity, promise, or decision that needs attention this week.

READ

Start with what the customer actually said or did.
Separate known evidence from the team's assumption.

OWN

Choose one useful next action. Name its purpose, owner, and date before the review moves on.

REPAIR

Name the breakdown that happened more than once.
Test one small system change before next week.

Scan. Decide. Coach. Repair.

Designed for about 15 minutes. Stop reporting everything; inspect the exceptions that can change the week.

0-3 MIN - SCAN

- 1 **NEW WORK** - Any lead or request without a clear owner?
- 2 **PROMISES** - What is due before the next review?
- 3 **SIGNALS** - Which record is missing the customer's latest words?

3-10 MIN - DECIDE

- 4 **NO NEXT DATE** - Which opportunity could quietly slip?
- 5 **STALE PROPOSAL** - What decision is still unsettled?
- 6 **THIS WEEK** - What must happen, who owns it, and when?

10-15 MIN - COACH + REPAIR

- 1 **ONE MOMENT** - Coach from the customer's actual words.
- 2 **ONE REPAIR** - Change the process, not just this opportunity.
- 3 **ONE PROOF** - Name what you will inspect next week.

THE WEEKLY OUTPUT

- ☐ One opportunity that needs attention.
- ☐ One purposeful next action.
- ☐ One owner and one date.
- ☐ One repeated breakdown.
- ☐ One repair to inspect next week.

Three exceptions. One honest next move.

Use initials or an internal ID. Record only the minimum customer context needed to make the next decision.

EXCEPTION 1



1 Opportunity / stage

2 Signal / unresolved decision

3 Purpose / next action / owner + date

EXCEPTION 2



1 Opportunity / stage

2 Signal / unresolved decision

3 Purpose / next action / owner + date

EXCEPTION 3



1 Opportunity / stage

2 Signal / unresolved decision

3 Purpose / next action / owner + date



REPAIR THE REPEAT

☐ What broke more than once?

☐ What one change will we test?

☐ Who owns the repair?

☐ When will it be in place?

☐ What evidence will we inspect?

Coach the thinking - not the script.

Stay curious. Follow the answer. Try two natural ways to respond, then inspect the next real conversation.

1 - START WITH EVIDENCE

What did the customer actually say or do?

2 - TEST THE STORY

What do you think that meant - and what evidence supports it?

3 - FIND THE DECISION

What decision still feels unsettled for them?

4 - OWN THE NEXT MOVE

What useful next action would help, who owns it, and by when?

5 - REPAIR THE SYSTEM

Which part of our process allowed this to become unclear - and what one change will we test this week?

THE COACHING RULE

Do not give a speech. Ask, listen, test the assumption, and make the next move visible.

The proposal was not stuck on price.

Fictional composite - seven-person office-move and setup firm.

CURRENT RECORD

Medical-practice proposal, nine days old. Stage says Proposal sent. No review date is recorded.

CUSTOMER SIGNAL

The doctors are nervous about losing a clinic day. I don't want to promise everyone Monday will be normal unless I'm sure.

OWNER + REP

Owner: "We may be treating a continuity worry like a price delay. What would help the doctors feel ready?" Rep: "A one-page move timeline and a short call with both doctors."

NEXT ACTION + SYSTEM REPAIR

Rep sends the timeline Tuesday at 10 a.m. and asks for a 15-minute Wednesday call. Repair: proposal review now requires latest signal, unresolved decision, owner, and dated next action.

EVIDENCE NEXT WEEK

Inspect every proposal-review record for the four required fields.

WHAT CHANGED?

Continuity risk became visible. Price remained a hypothesis, and the team repaired the process that let the proposal sit.

Fix one real breakdown. Then inspect it.

Do not leave with twelve improvements. Choose the breakdown that affected real work this week.

OPPORTUNITY ACTION

Purpose: _____ Owner: _____ Date: _____

ONE SYSTEM REPAIR

Breakdown: _____ Change to test: _____ Owner: _____

PRIVACY + USE

Use initials or internal IDs. Keep out unnecessary contact, financial, health, and confidential project details. This is not HR, legal, or disciplinary advice.

NEXT REVIEW

Inspect what happened. Did the repair create clearer evidence, a better conversation, or a genuinely owned next action? Keep, adjust, or remove it.

THE WEEKLY RULE

Fix the opportunity. Then fix the reason it became unclear.

THE PAID BOUNDARY

This sheet controls one week. The complete Owner-Led Sales System builds the stages, ownership, evidence, coaching rhythm, CRM minimums, and human-versus-automation boundaries behind every week.