

How to Use the Weekly Sales Operating Plan

The goal is not to create a prettier calendar. The goal is to control the week before the week controls you.

Why This Sheet Exists

Most sales weeks do not fall apart because there was nothing to do. They fall apart because everything starts competing for attention at the same time. Customer requests, internal problems, email, administrative work, and random activity crowd out prospecting, follow-up, and opportunity development. This sheet forces you to decide what matters before the noise starts.

Use it the same way the earlier planning worksheets are used: repeatedly enough that the thinking becomes automatic. At first, the structure may feel rigid. That is useful. The repetition trains you to identify priorities, protect selling time, define the result you expect, and review whether the week produced movement or only activity.

How to Use It

1. Set the weekly target	Define the one result the week must produce. Do not write a vague goal such as "make calls."
2. Choose the top three priorities	Name the accounts or opportunities that deserve focused action and define the result you are trying to create.
3. Protect the time	Put prospecting, customer work, follow-up, and documentation on the calendar before open space gets consumed.
4. Define prospecting commitments	Set targets for new contacts, meaningful conversations, and meetings or next steps created.
5. Review the week honestly	Separate progress from motion. Carry forward what still matters and stop pretending weak activity was productive.

What to Watch For

Busywork disguised as progress	A full calendar does not prove that pipeline, access, value, or opportunities moved.
Priorities with no required action	If you cannot state the next action and desired result, the priority is not defined.
Protected time that is never protected	Do not schedule prospecting and then surrender it every time something louder appears.
Targets that only measure volume	Calls and emails matter, but meaningful conversations and next steps matter more.
The same work carrying over every week	Repeated carryover usually means avoidance, weak qualification, or a next step that was never made specific.

Recommended Use

Complete the plan before the week begins, preferably late Friday or first thing Monday before email and requests take over. Use it every week for at least six to eight weeks while the habit is being built. After that, keep using it if it improves execution, or return to it whenever prospecting slips, follow-up becomes vague, priorities start drifting, or the calendar no longer reflects what you claim matters.

Plan the week. Protect the work. Review the result.

Weekly Sales Operating Plan

Plan the week before customer requests, internal problems, emails, and random activity take control of it. Protect time for the work that drives growth, then review whether the week produced real progress.

Week of:		Weekly target - What must this week produce?	
Top Priorities			
Priority	Account or Opportunity	Required Action	Desired Result
1			
2			
3			
Protected Time			
Activity		Planned Day or Time	
Prospecting			
Customer calls and meetings			
Follow-up and opportunity work			
Planning and documentation			
Prospecting Commitment and Critical Follow-Ups			
Prospecting Measure	Target	Critical Account / Opportunity	Required Next Action / Due Date
New accounts contacted			
Meaningful conversations			
Meetings or next steps created			
Weekly Focus			
Day	Primary Focus		
Monday			
Tuesday			
Wednesday			
Thursday			
Friday			
End-of-Week Review			
What moved forward?		What did I learn?	
Where did I drift, react, or avoid the work?		What must carry into next week?	
Reality Check			

- ☐ Did I protect time for prospecting and growth?
- ☐ Did I move real opportunities forward?
- ☐ Did I create new access, information, value, or next steps?
- ☐ Did my calendar reflect my priorities, or did the week control me?
- ☐ Was this a productive week, or just a busy one?

Plan the week before the week plans itself.