

Sales Performance Routines

Part of: Habit 10 – Performance Routines

Why you need it: Simple, proven routines that create structure, focus and accountability in sales teams are essential to Sales Excellence

Execution

03

Read time

10
minutes

Level

Simple

Audience


Sales Leaders
& Managers

Benefit

**Ideas &
Inspiration**

About this guide

Each business needs to form its own routines. This tool includes some practical ideas to consider.

Tips for success

Consistency beats complexity. Greater routines drive discipline, energy and performance.

Implementation hints

- Leaders lead it
- Start with 3–4 routines that fit your business
- Show up consistently – especially when busy
- Keep it simple – adapt and evolve

What you'll get out of it

3–4 performance routines that are right for your business and an agreed cadence.

Useful links

- [Execution: Performance Routines](#)
- [Execution Overview](#)
- [Sales Excellence](#)
- [Sales Excellence toolkit](#)

Sales Performance Routines

1. Leadership-driven routines

Great sales execution starts with leaders who are close to the action- setting expectations, removing blockers and reinforcing standards.

Routine	Description	Who’s Involved	Why It Works
GM Monthly Customer Visit	Senior leader visits or calls a key customer	GM + Salesperson	Reinforces importance of customer experience, gathers insight
Sales Leader ‘Top 5 Deal’ Reviews (Weekly)	Sales leader personally checks on 5 priority deals	Sales Leader + Individual Salespeople	Focuses attention, removes excuses, models accountability
End-of-Month Funnel + Forecast Session	Full team review with leadership commentary	GM, Sales Leader + Team	Adds strategic context, links sales to business results
Leadership Presence in Daily Huddles	GM or Sales Leader joins at least once a week	Ops + Sales Teams	Shows commitment to frontline excellence
Open Quote Chase by Sales Leader	Sales leader selects 2 open quotes to personally follow up	Ops + Sales Teams	Sets example of urgency and customer care

Sales Performance Routines

2. Weekly and Monthly Sales Rhythms

Routine	Description	Who’s Involved	Why It Works
Weekly Coaching Call (20 mins)	1:1 focused on pipeline and sales behaviours	Sales Manager + Salesperson	Builds habits and performance culture
Monday Pipeline Review	Prioritise active deals, resolve stuck ones	Sales Team	Sets tone for the week
Mid-Month Forecast Check-In	Spot early risks to monthly target	Sales Leader + Sales Team	Enables fastercourse correction
Monthly Win/Loss Round-Up	Share examples, xtract learning	Sales Team	Peer learning drives sharper execution
Quarterly Sales Day Blitz	All hands on outbound calling or follow-ups	Everyone	Create energy, drives momentum
Territory plan reviews	Review territory plans including key accounts and share of wallet	Sales Leader and Sales Team	Improves growth – market share, share of wallet and margin

Sales Performance Routines

3. Frontline Routines

Routine	Description	Who’s Involved	Why It Works
Daily Sales + Ops Huddle (15 mins)	Confirm orders, service issues, urgent needs	Sales + Operations	Ensures customer delivery reliability
No Open Quotes Overnight	All quotes sent or logged same day	Salesperson	Reinforces professionalism and momentum
Relentless Quote Follow-Up	Set cadence for every quote (e.g., Daay 5, Day 10)	Salesperson	Improves conversion by staying front of mind
End-of-Day Quote Check	Final review of unsent or unfollowed quotes	Salesperson	Prevents lost opportunities due to inaction

Sales Performance Routines

4. People Development Routines

Routine	Description	Who’s Involved	Why It Works
Sales Induction on Sales Excellence	Orientation to tools, expectations and behaviours	New Starters + Sales Leader	Establishes standards from Day 1
Monthly Sales Coaching Session	Structured 45–60 minute review and skill development	Sales Manager + Salesperso	Supports growth, reinforces accountability
Quarterly Peer Shadowing	Sales colleagues observe successful colleagues	Sales Team	Builds practical skills through observation
Celebrate Wins Publicly	Share standout deals, behaviours or effort	Whole Team	Reinforces what ‘great’ looks like