

Team Forecast Meeting

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Once managers do their 1:1s with team members, use this meeting to regroup with the Director / VP (Second line leader) and review what deals are coming up and where forecasting stands at a higher level.

High value deal review

Summary:

Next Steps:

Diagnose gaps in the forecast

Summary:

Next Steps:

Develop a plan of action to fill the gaps

Summary:

Next Steps:

What's working and what's not

Summary:

Next Steps:

Review the pipeline for the next period

Summary:

Next Steps:
