[Company name]

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Monthly Sales Target Tracker

Tracking a salesperson's month against target: weekly sales, deals in progress, and a manager review.

Document	Monthly Sales Target Tracker
Prepared by	[Name and role]
Owner	[Name and role]
Version	1.0
Date	[DD Month YYYY]
Review date	[DD Month YYYY]

Target summary

Field	Entry
Salesperson	[Salesperson name]
Sales manager	[Sales manager name]
Tracking month	[Tracking month]
Monthly target	[Monthly target] [Target currency]
Sales to date	
Remaining to target	
Percentage achieved	

Weekly sales record

Week ending	New orders	Value	Cumulative value

[Company name]

Deals in progress

Client company	Opportunity	Value	Expected close	Stage

Target review notes

Field	Entry
Reviewed by	[Sales manager name]
Review date	
On track?	
Support needed	
Actions agreed	

[Company name]

Month-end close

Field	Entry
Final sales value	
Target	[Monthly target] [Target currency]
Achieved?	
Carried forward	
Manager sign-off and date	

Completion checklist

	The monthly target ([Monthly target] [Target currency]) is stated for [Tracking month].
	Weekly figures add up to the sales-to-date figure in the summary.
	The review by [Sales manager name] is recorded with actions agreed.