Y FIELD SALES TEMPLATE

Field Sales Visit Report

An editable template for clear next steps, CRM updates, follow-up, and manager coaching.

Best used	Immediately after a meaningful customer visit
Core output	Outcome, buyer intent, action-owner-date, risk, and CRM changes

Visit details

Account	*Customer or account name*
Contacts	*Names, roles, and decision influence*
Visit	*Date, location, and meeting type*
Objective	*What outcome was expected from the visit?*

Outcome and buyer intent

Outcome	*What changed, what was agreed, and what remains open?*
Buyer intent	*Exploring, evaluating, ready, delaying, or at risk - plus the evidence*
Next step	*Action, owner, due date, and customer commitment*
Risks	*Budget, stakeholder, procurement, technical, legal, timing, or competitor risk*

CRM and follow-up

CRM changes	*Stage, close date, amount, probability, contacts, tasks, and risk notes*
Promised follow-up	*Recap, proposal, pricing, technical answer, or meeting invite*
Coaching signal	*Where should the manager help?*
Rep confidence	*1 (low) to 5 (high), with one sentence explaining the score*

Manager review checklist

[ ]	The outcome states what changed, not only that the meeting went well.
[ ]	Buyer intent is supported by an observed action, question, or commitment.
[ ]	The next step has an action, an owner, and a date.
[ ]	Material risks and missing stakeholders are visible.
[ ]	Every CRM field that should change is listed.
[ ]	Promised follow-up has a clear owner and deadline.
[ ]	The coaching signal tells the manager where help is needed.

Completed example

Account	Northline Distribution
Contacts	Sarah Martin, Operations Director; Karim Benali, Site Manager
Objective	Confirm scope and blockers for a three-site pilot
Outcome	Operations wants to proceed; finance approval is still missing.
Buyer intent	Evaluating. The operational sponsor requested two pricing options by Friday.

Next step	Rep sends revised proposal Friday; Sarah schedules finance review Tuesday.
Risks	Budget owner absent; competitor mentioned; close date may slip.
CRM changes	Stage to Proposal; update close date; add budget risk; create Friday task.
Follow-up	Recap today, revised proposal Friday, finance invite Tuesday.
Coaching	Help frame the ROI for finance and sharpen competitive positioning.

Three-step workflow

Step	Action	Output
1	**Capture**	Record the facts while the customer wording is still fresh.
2	**Structure**	Convert the debrief into this report and the required CRM fields.
3	**Act**	Send the promised follow-up and surface risks to the manager.

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