NOTEFIELD 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

Fictional example. The people, company and commitments illustrate the template only.

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.

notefield | notefield.work