

## Sales Meeting Agenda

I hope you are getting some real, measurable value from your agenda's, because many people are not. Take a good look at this to be certain that yours passes the test.

A good sales meeting normally has all of the elements below:

- 1) Bring everyone together to hear a common message
- 2) Share learning from the field
- 3) Provide product training
- 4) Provide sales training
- 5) Compare and contrast performance to foster competition among salespeople
- 6) Bonding

### **Bring everyone together to hear a common message**

- What are the messages that you want to send?
- Who is the appropriate sender?
- Do you want to lay out the company strategy?
- “Big picture” changes in product/customer mix?
- Do you want to tell people what you see happening over the next quarter? Year?
- Do you want to drive home the message of the need to make changes in the way we approach our customers? Or the way we try to sell?
- Do you want to lay out the consequences of failure?
- Do you want to lay out the rewards for complying with the new approach?
- Do you want to get your sales management team to “declare” publicly their support for your vision so that they are all accountable, publicly, for supporting the plan?
- Do you want to tell people about organizational changes?
- Do you want to talk about changes in compensation?

These are all topics that normally begin sales meetings. They are also normally reinforced at the end of sales meetings so that we follow the best communication method:

Tell them what you are going to tell them  
Tell them  
Tell them what you told them

## **Share learning from the field**

Sales meetings are supposed to provide an opportunity for people to come together so that some of the learning comes from other people in the field. Is there a salesperson that has done a good job selling a particular focus product? Ask them to prepare a training program on how they have done it.

Is there a salesperson that has done a good job selling certain types of customers? Opening up new customers? Ask them to prepare a training program on how they have done it.

Also, there should be opportunities during other general sessions to seek input from the group. Care must be taken, however, not to let these turn into gripe sessions.

## **Provide product training**

A lot of sales meetings spend a lot of time on this topic. What percentage of the meeting do we need to devote to product training? As in the question above, how much of this work needs to be done by staff as opposed to the salespeople themselves?

## **Provide sales training**

This is also a part of most good sales meetings. (I assume that this is my part). Here, we need to decide what the key messages are—my focus is normally the process of selling, but we need to talk this out in some detail.

## **Compare and contrast performance to foster competition among salespeople**

You set the tone for your meetings by the information that you share publicly about sales performance. You can start the meeting by posting sales results, by salesperson. You can do this with either dollars — which might provide one set of results; or by percentage of budget accomplishment—which might provide another set of results. For example, you might have a salesperson that sold \$10 million but was only at 60% of budget while another salesperson might have only sold \$2.2 million but be at 110% of their goals.

You can also present numbers in more detail—such as sales of focus products to focus customers. Average gross margin of sales. Sales to new accounts. New accounts opened.

One of the things that I like to do during meetings is to ask the salespeople to forecast the specific major orders they will book in the next 30 days. I ask them

to write this down and then I track it and present results. Nothing better demonstrates the professionalism of a salesperson than their ability to predict the future. Note that I do not ask them for a dollar forecast but a list of key customers/opportunities that they think will place a specific order in the next 30 days.

### **Bonding**

A lot of effort normally goes into sales meetings for this purpose. I am “iffy” about its value but I believe that there does need to be an opportunity for the salespeople to spend time with their managers, other salespeople, and other key people in the company that they need to work with to succeed. This is why I like to hold sales meetings at plants so that production people get to know salespeople and vice versa.

### **Action items**

Every section needs to end with a specific list of action items and due dates. Management should present one but the salespeople should be asked to read what they have written down as the Action Items from each section. This will allow you to check the message, messengers and the salespeople’s understanding of what is important.

Ultimately the purpose of every meeting is to define a common set of measurements, actions and resources so that our common goals can be met.

Yours may be great, or...you may be far off the mark that you could be on.

Joe

---

**For More Articles by Joe, See Online Library Member’s Area**