Weekly

Sales Team Meeting Agenda Guide

This guide offers explanation for the editable meeting template that follows.

1. Introduction

5 minutes

- 30 seconds or less per team member
- 1 personal headline (fishing trip, daughter graduation, vacation plans, etc.)
- 1 professional headline (positive client meeting, positive deal progression, strong referral, client success, etc.)

***Tip** – Manager must tightly manage this opening to avoid 'talkers' exceeding the 30-second limit.*

2. Metrics Review

5 minutes

- Establish 5-7 weekly metrics to review
- Ensure a minimum of 4 **leading metrics** (leading metrics measure high gain activities that drive lagging metrics. For example, "number of closed sales" is a lagging metric, whereas "number of meaningful business conversations with new accounts" or "discovery meetings scheduled for this coming week" are leading metrics.)
- In this section, simply ask everyone to take a minute to review each metric. If a metric is off, determine what counter measure is necessary—and decide who is responsible for taking action.

***Tip** – If one individual sales person is overly concerned with any of the metrics, quickly schedule an offline meeting. This is likely a coaching opportunity.*

3. Quarterly Initiatives Check-In

5 minutes

- Each quarter, develop a list of high-priority initiatives intended to move your sales team towards strategic objectives and goals (Examples: trade shows, key events, new training, etc.)
- Run through each quickly to see if they are progressing as expected, and if not, determine if you need to assign a specific to-do item to one or more team members.

4. Training Component
15 minutes

- Designate one topic or skill per sales meeting that your team can use extra reinforcement on.
- Option: assign the topic to one or two of your reps that have developed best practices in that area and have them present to the rest of the team.

5. Housekeeping
5 minutes

- Share any policy changes, process updates, announcements, feedback for other departments, etc.

6. Win/Loss Story Sharing
15 minutes

- Take turns rotating through the team so that each salesperson has a week to present what they've learned through the experience of a win or loss.
- You can also use this time to review key opportunities that your team is working.

7. Competitor News
5 minutes

- Assign 1-2 competitors to each sales person.
- Ask them to use Google Alerts (or a similar technology) and their industry network to become the subject matter expert on specific competitors.
- Each rep provides a 30-60 second update on their assigned competitor(s).
- If no news – simply say, "No News".

Tip *– To keep this section short and to the point, create the expectation that they should provide a verbal summary of their points with any detail in written form for circulation after the meeting.*

8. Closing/Action Items
5 minutes

- Close out the sales meeting by recapping any notable takeaways from the Win/Loss Story Sharing section.
- List all any offline meetings that require scheduling.

Tip *– The close should be brief and you should always be sure to end right on time.*

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Sales Team Meeting Agenda Template

Date: ______________________

Start Time: ______________________

Stop Time: ______________________

1. Introduction

5 minutes

2. Metrics Review

5 minutes

3. Quarterly Initiatives Check-In

5 minutes

4. Training Component

15 minutes

5. Housekeeping

5 minutes

6. Win/Loss Story Sharing

15 minutes

7. Competitor News

5 minutes

8. Closing/Action Items

5 minutes