

SALES MEETING

Start and finish meetings on time.

(We must stay on track and the discussion should NOT wander into areas not on the agenda. If an issue comes up that is urgent, we will put it aside and deal with it at the end of the meeting or set another meeting to deal with it, if it is important enough). Meetings must be Professional and polite.

Date/Time: _____

Host: _____

Attendees: _____

Topics:

Quote for the Day:

Housekeeping:

Departments:

Accounting/Data Entry:

Credit/Aging:

Art Department:

Digital Department:

Open Postions:

KeySpots: _____

Other: _____

Outstanding Items:

Sales/Specials:

Scheduled Individual Meetings: _____

Key roles and responsibilities:

- Leader
- Note Taker
- Timekeeper
- Facilitator (if applicable)

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Excellence: Sales person Success Stories:

Brief individual reports on activity, plans; recognition of team or specific Rep accomplishments

Personal:

Account:

This Week's Major Account Presentations:

Expectations: _____

Trends/Opportunities/Threats: Information relative to industry, competition, or "big picture" issues

Scheduled Sales

Activity/Events: _____

Upcoming Week: (based on status of sales-to-date, pipeline, sales technique etc.)

Any other Business from Team Members: _____

Topic Presenter: _____

Education: selling techniques, territory or account management, best practices, etc. based on issues of the day / team status.

Upcoming training schedule (give brief details and stress the importance of attendance).

Adjournment: Consensus and summary, Q&A, feedback and follow-up items/delegation of activities