

# **General – Effective - Meeting Agenda:**

## **Effective Management & Sales Meetings**

The key to successful sales and management meetings is careful planning and forethought. There is nothing more boring than a badly run sales/staff meeting. One of the ways to prevent this from happening is to have a sales/staff meeting plan that consists of:

### **1. Determine your meeting objectives**

- a). Meetings must be focused and have a clear purpose.
- b). Don't try to squeeze too much into the meeting.
- c). Develop meeting outline.
- d). Identify pre-meeting work assignments
  1. Objection handling - bring five of their most common objections.
  2. Prospecting – bring five ways they generate leads.
  3. Product/service offering – have them prepare a demonstration/presentation.
  4. Opening new accounts – have them bring five key accounts they want to break into and be prepared to develop strategies.
  5. Selling value – have them bring five reasons why customers should pay more for their products and services.

### **2. Prepare your agenda**

- a). Try to hand them out several days in advance.
- b). Clearly communicate what they need to do to prepare for the meeting.

### **3. Determine meeting logistics**

- a). Who should attend.
- b). Room setting – e.g. under (20) conference room, over (20) class room style.
- c). Best time and place.
- d). Should you include a guest speaker/special subject?

#### **4. Conduct the management/sales meeting**

- a). Start the meeting on time.
- b). Set meeting objectives.
  1. Post meeting agenda.
  2. Tie expectation of group to meeting objectives by going around the room, directly asking each participant what they would like covered on this topic.
  3. Post their expectations on the wall or flip chart.
  4. Keep testing their understanding of the discussions
- c). Make sure they are interactive – they learn better from doing versus a lecture.
- d). Determine role-play, contests, or the type of sales rep presentations.
- e). Run the meeting with passion and enthusiasm.
- f). End the meeting with a call to action – if meeting is new account development, have them demonstrate success during next sales meeting.
- g). Use the four T's of conducting any meeting:
  1. Tell them what you're going to tell them
  2. Tell them
  3. Test them
  4. Tell them what you told them.
- h). Keep meeting under your control – table individual discussions for later one-on-ones
- i). For long meetings take periodic breaks.
- j). You don't have to have all of the answers – bounce questions back to the group.
- k). At the end of the meeting, go around the room to see if expectations and objectives were met.

#### **5. Determine visual aids**

- a). Be creative – use pictures, audio tapes, video tapes, or PowerPoint to make an interesting impact.

#### **6. Action Plan Follow-up**

- a). Get out into the field to observe and verify training results.
- b). Look for signs of quantitative and qualitative performance.

## Dealing With Problem Participants

No matter how well you plan a meeting, you may run into problem participants. Naturally, you do not want to embarrass, confront or argue with these types of reps. Here are three types of problem participants and how to deal with them:

- **The shy person** – even though this person is not affecting the group, you need to draw the person into the discussions. Sales/staff meetings work best when all attendees participate. You do this by directly addressing the person by his/her first name when asking questions.
- **The Talker** – These people are the opposite of the shy ones and tend to want to answer every question. You prevent this person from taking others share of the discussion by saying “lets hear from someone else”.
- **The egotist** – Sometimes you get an employee who feels they know it all, and the training being offered is a waste of time. This type of behavior is disruptive, but it can also be a challenge. These people come in two types. The first type is the one who is a high performer and really does know what he/she is talking about. You want to get this person on your side by asking them “how would you do this differently?” If she has a better mouse trap give him/her praise and recognition in front of the group – since that is what they are craving. Another strategy is to refer to his/her comments when you are making a point in your presentation.

The second type of person does not have a successful track record. With this person, call their bluff and if they know what they are talking about, the group will learn from it. However, if they do not know what they are talking about, the group will know it, and let him/her know it and they will tend to back off.

(conducting effective meetings)

**1. Objectives**

**2. Agenda:**

**Opening**  
**Successes**  
**Issues (individual needs)**  
**Meeting Objectives (management)**  
**Action Plan(s)**  
**Closing**

**3. Logistics**

**4. Staff – Attendees – Communication**

**5. Visual Aids**

**6. Follow-up (Tracking)**

## The SMART Management System

The Sales Manager's main job is to consistently make quota by ensuring tasking is done through sales reps, not by doing it yourself. Performance management is the process of establishing the overall sales force tasking goals and objectives, and then implementing monitoring systems so you can identify when tasking adjustments are necessary to achieve organizational revenue and profit goals. Once you have established tasking goals and objectives, you then assign them to the individual members of your sales team.



Unfortunately, individual sales reps are prone to having difficulties in their sales tasking activities. Some months (or weeks) they sell above quota, then the following month they are caught up in non-selling tasking and fall behind quota. Your role is to *help them do* what tasking is necessary to ensure a future yield.

### Questions to Ask

When the results you are looking for aren't there, you have to ask yourself the following questions:

- 1. Do they know what performance and quality standards are expected of them?**

If there are no standards, how can they, or you, judge if a rep is doing a good/poor job? Therefore, you must establish standards that are **SMART – specific, measurable, attainable, realistic and time-bound**. Once you have done this, you must periodically appraise the rep's performance against standards so they know when and where adjustments in their behavior are necessary.

**2. Do they have the skills, knowledge and resources to do the job?**

Do they possess the required face-to-face, business development, and technical skills? The only way for you to know is observation in the field and during personal interactions.

**3. Do they want to do the job?**

Have you provided an environment that motivates them to do the job? Are they personally motivated to do the job?

**4. Obstacles, do you or the business processes get in their way?**

Are you or your Company's business processes getting in their way?

### **The SMART System**

No one can judge a job without comparing it to the job's established standards. Without performance standards, you cannot determine whether the sales rep is doing a good/poor job. Establishing performance standards tells the sales rep what is expected of them.

Unfortunately, studies have shown that most cases of poor performance can be attributed to organizations failing to establish performance standards or the processes to measure performance. Below we provide you with the tools to implement a performance management system. Our use of the "**SMART Performance Management System,**" establishes performance standards, a means of periodically measuring success, and methods of providing corrective action planning to keep your sales team on track.

The SMART Performance Management System involves 5 basic steps:

- 1. Setting Goals** and objectives – sales, business and professional growth.
- 2. Main Tasks** - SMART tasking planning – specific, measurable, attainable, realistic and time-bound.
- 3. Analysis** - Implementing a performance measurement and evaluation system.
- 4. Review** - Formal performance reviews and appraisals.
- 5. Transformation** - Revising goals and objectives and renewing the process.

## **Establishing Goals and Objectives**

The sales manager first must translate the organization's revenue and profit goals, established by its executive management, into individual specific tasking goals and objectives. Establishing goals and objectives is the beginning of the planning process. It establishes individual goals and objectives for:

- Annual sales goals
- Annual profit goals
- Business growth
- Professional growth



These three areas work together to improve your Company's revenue and profit objectives while improving the individual sales reps professional growth.

### **Annual Sales Goals**

Your executive management may establish an annual sales growth increase over last year's performance based on both market and productivity factors.

For example, an 18% revenue growth objective may mean that you need a 32% increase in new customer call frequency. However, your observations of your sales team may have you distribute this objective unevenly based on individual performance (e.g. 42% for rep A, and 20% rep B, and 32% rep C).

### **Annual Profit Goals**

Your executive management team may also establish profit goals of 10% higher than previous year's performance. This may require that you concentrate the sales team on higher profit customer groups or products while eliminating others.

For example, you may have your reps concentrate on selling high profit, whole system lease purchased equipment replacements, which include a five-year service agreement. You may also choose to eliminate low profit (bid work) from property management companies.

### **Business Growth**

Your executive management team may wish to enter new markets by selling uniquely packaged products and services. This may require you to allocate your sales teams tasking time to these initiatives.

For example, your organization wishes to sell high profit, gas-fired humidifiers to the owner occupied commercial office market. You then develop a marketing list and assign tasking time and tactics to the sales reps to capture market share.

### **Professional Growth**

All sales reps are not equal in knowledge, skill sets, and competencies. Depending on their weaknesses, they should have a continuous learning plan to get them to perform at established standards where they need to go both professionally, as well, as career wise.

Aside from seeking feedback from you, their peers, and colleagues on what they do well and what they can do to improve on, they should, with your help, determine which of their weaknesses would have the greatest increase on their effectiveness, develop a plan to learn, and then schedule it in with their other tasking items.

For example, one of your reps is having a difficult time making cold calls and providing timely account follow-up. You have observed, and both agree, the reasons to be poor pre-call and account planning. You then both agree that personal study and on-the-job training are necessary, and implement an implementation plan.