

# How to Conduct a Successful Sales Team Meeting

This is a series of Training for your Management TEAM

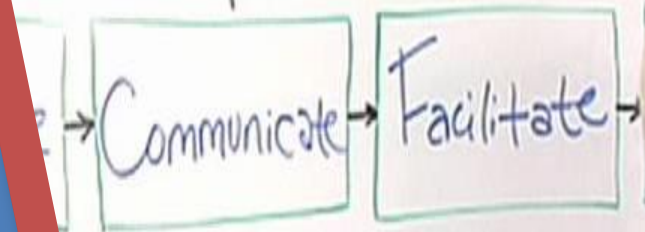
Presented by J.W. Owens



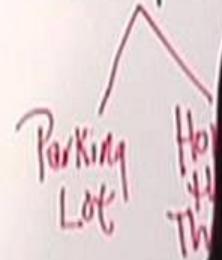
A Management Perspective 303 Series

How to RUN Team Meetings

4 Key Elements



- Agenda
- Action Items
- On Time
- On Topic



# How to Conduct a Successful Sales Team Meeting



A **well-trained sales team is a valuable asset** to any small business.

Sales team training often occurs regularly in semi-formal meetings at the **beginning of each week, day or month.**

A successful sales team training meeting **helps sales staff to gain knowledge and experience, while addressing current trends and concerns of the team, recognizing outstanding achievements, providing encouragement and bolstering employee motivation.**

# How to Conduct a Successful Sales Team Meeting



**Step 1. Provide coffee, water, juices and light food for all attendees.** Situate the refreshments in such a way that encourages participants to take some at anytime.

This will help people to remain focused on the meeting, rather than hunger or thirst.

**Step 2. Create a strictly time-bound agenda** for the meeting to ensure that presenters can discuss all pertinent points without extending the allotted time.

**Do not try to cover too much information in a single meeting.** Scheduling regular meetings can be more effective than attempting to squeeze too much information

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**Step 3.** Schedule the meeting at least 15 minutes before your desired start time. **Allow team members to chat informally over refreshments before the meeting begins.** Inform all team members of exactly when the actual meeting is to begin, and start the meeting on time. **Provide a meeting agenda to each participant at the start,** so that everyone knows what to expect.

**Step 4.** Review the team & recent accomplishments, or progress toward departmental goals at the beginning of the meeting. Discuss the **exemplary achievements, or the successes of individual team members and the group as a whole.** That will set a positive

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**Step 5. Cover a portion of an ongoing sales training curriculum during the meeting.** Use a thorough curriculum. Take the time to have your sales force leaders develop a program for your company, or invest in a commercially available sales training program.

**Step 6. Discuss areas of possible improvement** for your specific team after reviewing the ongoing sales curriculum. The ongoing curriculum is designed to continually grow the skills and abilities of your sales force, while this discussion should be custom-tailored to the daily needs and experiences of your team members.

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**Step 7. Provide time for team members to ask questions, or share additional information at the end of the meeting.**

**Create an open, non-threatening atmosphere that encourages junior team members to present observations, ideas and questions.**

**Remind participants of the date and time of the next meeting before adjourning.**

# My Sales Meeting

This is my 2 sided Sales meeting Agenda.

Front Page

## 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: \_\_\_\_\_

#### Key roles and responsibilities

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

### Open AD Postions:

PAPER: \_\_\_\_\_

OTHER: \_\_\_\_\_

### Outstanding Items:

\_\_\_\_\_

### Sales/Specials:

\_\_\_\_\_

# My Sales Meeting

This is my 2 sided Sales meeting Agenda.

Back Page

**Scheduled Individual Meetings:** \_\_\_\_\_

**Excellence:** Sales person Success Stories:

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

Personal:

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Account:

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**This Week's Major Account Presentations:**

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**Expectations:** \_\_\_\_\_

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

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**Scheduled Sales**

**Activity/Events:** \_\_\_\_\_

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

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**Any other Business from Team Members:** \_\_\_\_\_

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**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).

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



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# Good Selling !



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Perspective 303 Series**



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