

# Sales Team Meeting

Issue the agenda at least 7 days in advance to allow planning time.



## 1. Period Results - review the financials and share/restate the vision

Big picture results, not a name and shame league table. Review YTD, month to month and look forward at run rates and forecast.

## 2. Sharing Success - individuals share best practise

Each team member to offer up some best practise or share something that has gone particularly well - the aim is to inspire and upskill each other.

## 3. What's going on outside?

A discussion about the marketplace and what we're hearing from customers.

## 4. Breakout groups - discuss a topic and feedback to gain consensus

Eg. The best way to handle a common sales objection

Eg. An update on a Competitor who impacts our results

Eg. The best questions we've asked our customers this month

## 5. Team Forecast and Action Plan

Each team member gives an update on their sales pipeline and revenue forecast. The team offer each other help to ensure the overall team achieve success. The team collates an aligned action plan to support the forecast. Focus on the 'how' and not just the 'what'.

## 6. Focus for next month/quarter

Led by the line manager, this session is a roll-out of new products/services/initiatives and an opportunity to motivate and inspire the team.

Can the people in your 'succession plan' run part of the meeting?

Where ideas for change are generated, encourage the team to take ownership/projects

Team members should come to the meeting prepared to present