

Weekly

# Sales Team Meeting Agenda Guide

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

## Headlines

(Personal/Professional)

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.*

## Metrics Review

5 minutes

- Establish 5-7 weekly metrics to review (Examples; New Customer Opportunities, Existing Customer Opportunities, Funnel/Pipeline Health, Booked Discover Meetings, % of target attainment, etc.)
- Ensure a minimum of 4 ‘leading metrics’ (leading metric measures high gain activities that drive lagging metrics. For example, # of closed sales is a lagging metric whereas # of meaningful business conversations with new accounts or ‘Discovery Meetings’ are scheduled for this coming week is a leading metric.)
- To review these metrics, simply ask everyone to take 60 seconds to review each metric and in the last 4 minutes ask for comments and/or questions. If a longer discussion develops, defer to a separate meeting within your ‘to-do’s’ for next week.

*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.*

## To-Do's/ Project Updates

5 minutes

- First, run through each To-Do and whomever is accountable simply says, “Done” or “Not Done”
- Second, run through each Project and whomever is accountable simply says, “On track” or “Off track”

*Tip – If a longer discussion is building beyond a 1-2 word update, cut them off and save for an offline meeting or create an action item related to the topic.*

## Housekeeping

10 minutes

- Within the timeframe provided, share any changes, additions or deletions to policies, processes, requests, announcements, coordination of event scheduling, feedback for other departments, etc.

*Tip – choose the important and urgent items that require their attention first. If there is time, take the balance of the 10 minutes to address the non-urgent items.*

## Win/Loss/ Story Sharing

20 minutes

- This part of the meeting is to ensure that the team is learning from their successes and failures through peer discussions
- Rotate through the team such that each sales person has their turn (1/week) to present what they have learned through the experience of a win or loss
- If they have no win or loss (and they're still employed – ha ha), they are to interview another team member to use their story

*Tip – Focus the discussion around the takeaway(s) of the experience by asking, "what did you learn from this?" and "What would you change or repeat, if you were to experience this again?" Ask the group for comments.*

## 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.*

## Closing/ Action Items

5 minutes

- Close the meeting by recapping the learning takeaway from the Win/Loss/ Story Sharing
- Run through the action items related to all topics
- List all of the offline meetings that require more time as To Do's

*Tip – The close should take no more than 5 minutes and you should always be sure to end on time.*

Weekly

# Sales Team Meeting Agenda

Date: \_\_\_\_\_

Start Time: \_\_\_\_\_

Stop Time: \_\_\_\_\_

## Headlines

(Personal/Professional)

5 minutes

## Metrics Review

5 minutes

[illegible]

## To-Do's/ Project Updates

5 minutes

Housekeeping

10 minutes

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Win/Loss/  
Story Sharing

20 minutes

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Competitor News

5 minutes

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Closing/  
Action Items

5 minutes

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