

# HOW TO RUN A GREAT **SALES TEAM MEETING**



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If you want to run a great sales meeting, practice often makes perfect. That's why planning is always a critical aspect of every great sales team meeting, especially when we consider the Harvard Business Review's recent survey of 182 senior managers who reported:

- **65%** said meetings keep them from completing their work
- **71%** said meetings are unproductive and inefficient
- **64%** said meetings come at the expense of deep thinking
- **62%** said meetings miss opportunities to bring the team closer together

Not only do these statistics highlight the fact that creating an outline will make your sales meeting run more smoothly, but your sales team will also be far more engaged, responsive and aligned with your message as a whole.

To help you stay prompt and retain sales reps interest, you need to consider a few aspects when planning your sales meeting agenda.

Continue to the next page to discover your **great sales meeting agenda template**, including best practices to remember and implement.



# YOUR GREAT SALES MEETING AGENDA TEMPLATE

## 1. Time-limit

Imposing a time limit is unbelievably useful in keeping the conversation to the point. Long gone will be the off-topic tangents and rabbit holes. Not only that, but your sales team will have an idea of how long is expected of them, which will keep them focused on the task, and can plan the remainder of their workday accordingly.

## 2. Celebrate Wins!

Not only is it fun and a great morale booster, but you'll strengthen your sales teams interpersonal connection by focusing on the celebration and recognition of wins, instead of failures or defeats.

## 3. Goals

Consider discussing up-front rules and expectations about sales meetings with your sales team: what will serve them best to produce the most actionable results when they leave? It's crucial to have a set plan ahead of time – even as simple as a couple of notes.

## 4. Main Points

Once you've set your goal, it's time to get to the main point of discussion. This could involve delegating tasks, role-plays, coaching, open-discussions, or reviewing performance.

## 5. Set Actional Takeaways

It's paramount each employee on your sales team leaves with a clear understanding of their next steps. However, it's also crucial to consider who needs to be scheduled into relevant future meetings. Did "Tom" have any exact steps to take? If not, it's likely he doesn't need to be included!

## Notes

## 6. Sharing

Your sales team is looking to you for guidance, direction and leadership. Share your “big picture” strategies, priorities, targets, and [KPIs](#) with the team. As a sales leader, you should only focus on the “what” (vision and [objectives](#)).

[Add lines/bullet points here]

## 7. Execution

Leave the “how” (tactics and implementation) to your sales team. Focus on what actions they’ll take by the next meeting. How will they keep sales opportunities moving forward? Each team member should share at least 1 takeaway and action they will take now.

## 8. Listening

Listen more and talk less. Sales meetings should not become sales training programs, product knowledge training sessions or reviews of what’s happened since the last meeting. Put away the PowerPoint! Instead, ask questions and stimulate discussions of real-life selling situations.





## 9. Learning

Ask team members to share specific sales challenges (closing, gatekeepers, objections, etc.) Encourage the group to share tips that have worked for them and could be useful to the group. Ask them to share the latest sales book they read, audio they heard or video they watched, and what was their biggest takeaway.

## 10. Regular Sales Meeting

When we work with Sales Directors we encourage them to have regular sales meetings so the sales team can plan their schedules around those dates.

“What if they’re travelling?” I hear you say –that’s no excuse! They can join the meeting via conference call to still contribute and learn. Make these meetings a habit by leading by example.

## 11. Input

Have an agenda for each meeting and ask the sales team for their input. What would they like to focus on? Your team will be more engaged if they’ve contributed. Be sure to circulate the agenda at least 24 hours prior, so the team comes prepared. Remember to respect their schedules by starting on time and ending on time (maybe even early!).



# Do's and Don't's OF A GREAT SALES MEETING

## Do's

- ✓ Have structured agendas and respect participants time.
- ✓ Keep it short. Start on time and end early.
- ✓ Keep it interesting and mix things up.
- ✓ Recognise accomplishments and celebrate wins.
- ✓ Encourage discussion and sharing of best practices.
- ✓ Provide actionable takeaways so they know what to do next!

## Don't's

- ✗ Have unstructured meetings and waste their time.
- ✗ Make it long, start late or finish late.
- ✗ Repeat the same old boring routine week after week.
- ✗ Recognise failures and highlight defeats.
- ✗ Encourage withholding of information and creation of silos.
- ✗ Forget to give actionable takeaways.



# **YOUR NEXT SALES MEETING** **WORKSHEET**

## **Time-limit**

## **Wins**

## **Goals**



# YOUR NEXT SALES MEETING WORKSHEET

## Main Points

## Actionable Takeaways

## Vision & Objectives





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