

Sales Meeting Agenda



BEHIND
YOUR BACK
BULLETIN

Date _____ / _____ / _____

► **SS-G Intro :: 10 minutes**

Each team member shares a **S**uccess **S**tory and 1 thing they are **G**rateful for—personally or professionally.

► **Results Review :: 10 minutes**

Sales is results. Period. Review sales results here and highlight sales leaders and recent wins.

► **Rock Review / Pipeline Number :: 5 minutes**

Each team member reports on their Quarterly Rock and states their Pipeline number (see pages 3-4).

► **Word on the Street / Internal & External :: 10 minutes**

What are customers and prospects talking and/or asking about? What is the competition doing differently?

► **Insight Generation :: 10 minutes**

What new insights do we collectively have to help our prospects and customers solve problems and grow?



RELEVANT INSIGHTS = DIFFERENTIATION

INSIGHT Idea made up of two or more pieces of data or info combined in a unique way that leads to new value.

► **D3 Session—Deep Dive on a Deal :: 15 minutes**

One team member shares details on current deal. Entire team discusses strategies and tactics to win.

► **Continuous Improvement :: 10 minutes**

Each week 1 salesperson is responsible for leading discussion on relevant sales book, article, podcast, video.

Content	Relevant insight

► **BBS & IDS :: 5 minutes** *(hard stop)*

Brief bitch session to candidly discuss challenges. Must present potential solution to drive IDS process.

Challenge	Potential solution

► **Cinema Sales Skills :: 5 minutes**

Relevant sales movie clip is played. Takeaway(s) discussed and documented.

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► **Recap To Do List / Cascading Messages :: 5 minutes**

Review commitments to be completed by the next sales meeting. Note person responsible.

What messages discussed today must be cascaded throughout the entire organization?

► **Rating 1-10 :: 5 minutes**

How did we do? On a scale of 1-10 (10 = best), how do we rate this meeting? What could be improved?

RATING	

WEEK 1

INSTRUCTIONS Note your top 5 prospects, the value of the deal, the probability of it closing within 90 days, the SSO and a prediction for what will happen next. That prediction will help us learn for the future.

Company prospect or client		Value of deal		The single next step that must occur to keep the sales process moving forward
COMPANY	CONTACT	VALUE	CLOSE %	SINGLE SALES OBJECTIVE
1 <i>Lennar</i>	<i>Tom Smith</i>	<i>250K</i>	<i>70%</i>	<i>Secure f-2-f meeting next week to discuss proposal</i>
PREDICTION <i>Smith will say "sharpen my pencil" & I'll consider only if we can meet f-2-f; he'll agree & we'll meet in Jan '18.</i>				

A simple prediction of what will happen next. We will review this prediction next week to learn if what we thought was accurate or . . . not so accurate. The goal isn't to be right, but rather to verify if our gut feelings are accurate or not and apply them to the next deal.

COMPANY	CONTACT	VALUE	CLOSE %	SINGLE SALES OBJECTIVE
1				
PREDICTION				
2				
PREDICTION				
3				
PREDICTION				
4				
PREDICTION				
5				
PREDICTION				

WEEK 2

The mind craves consistency and pattern recognition, so keep doing what you are doing. Look back at your Week 1 predictions—were they accurate, wildly inaccurate, or is it too early to tell? What lessons can you draw from the gap between what you thought would happen (prediction) and what actually happened?

Look at your predictions from last week. What did you learn? What can you apply to your predictions this week?

COMPANY	CONTACT	VALUE	CLOSE %	SINGLE SALES OBJECTIVE
1				
PREDICTION				
2				
PREDICTION				
3				
PREDICTION				
4				
PREDICTION				
5				
PREDICTION				
6				
PREDICTION				
7				
PREDICTION				
8				
PREDICTION				