

# Checklist for an Effective Sales Meeting

The more time your sales team spends in meetings, the less time they have available to actually sell. Use the following checklist to prepare for and lead an effective sales meeting—one that gets maximum results in minimum time.

## BEFORE MEETING

- Clarify purpose of meeting
- Set meeting time/location/duration
- Create meeting agenda including:
  - Purpose of meeting
  - Topics for discussion
  - Time allotted per topic
- Send invitations 3-5 days before meeting. Also send:
  - Meeting agenda
  - Any information sales team needs to review prior to meeting (i.e., documents, PowerPoint presentations, videos, sales figures)
  - What sales team should bring to/be prepared to discuss at meeting
- Confirm attendance

## DURING MEETING

- Remind team of meeting objective
- Briefly review last meeting (if necessary)
- Meeting leader shares updates/news including:
  - New products/services
  - Pricing changes
  - Promotions
  - Process changes
  - Quota changes
  - Competitors

**Salespeople share updates including:**

- Sales
- Sales activity
- Pipeline
- Successes
- Challenges

**Group discussion/questions/feedback/brainstorming—salespeople can discuss challenges and solutions at this time.**

**Sales training activity—may include:**

- Role-playing exercises
- Watching video
- A visiting speaker

**Next steps: Assign salespeople action items**

- Action item \_\_\_\_\_ Rep \_\_\_\_\_ Deadline \_\_\_\_\_
- Action item \_\_\_\_\_ Rep \_\_\_\_\_ Deadline \_\_\_\_\_
- Action item \_\_\_\_\_ Rep \_\_\_\_\_ Deadline \_\_\_\_\_

**Provide recognition of:**

- Individual salespeople
- Groups of salespeople
- Accomplishments of the business

**Motivational closing—may include:**

- Inspirational slogan or anecdote
- Sales challenge
- Sales contest
- Weekly goal

### AFTER MEETING

---

- Within 24 hours, send follow-up overview of key points discussed
- Follow up on action items as necessary

### NOTES