

Team Meeting AGENDA PLANNING TEMPLATE

As the quote to your right suggests, communication-related problems can be difficult to diagnose...

“The single biggest problem in communication is the *illusion* that it has taken place”
– *George Bernard Shaw*

Consider that if a person is a poor listener, they don't really know what they are missing! Similarly, if a sales leader or manager runs sub-standard team meetings, he or she may not be aware of it – or at least not aware of how much more effective those meetings might be.

The Most Common Challenge

Lack of planning is the biggest reason for poor meetings... and the most common reason given for not having planned a meeting or created an agenda is, “I didn't have time.”

But when one considers the advantages and benefits of a well-planned and consistently-executed team meeting, it becomes easier to MAKE the time:

- **Assessment:** Team meetings are key opportunities to assess the team all at once, measure the group's attitude and identify the best ways to leverage or direct their collective effort.
- **Team building:** We can't build team spirit if we don't regularly "assemble" the team.
- **Team motivation:** Many people will go the extra mile for the team; but we can't leverage team motivation if we only interact with people on an individual basis.
- **Thought leadership:** Driving a high-performance culture begins with helping people focus on the right things, and publicly identifying /reaffirming core values. Reminding the team that the “job can be done and you're confident they can do it is also a key component of thought leadership – as the late Zig Ziglar once said, “Many people have gone further than they thought they could because *someone else thought they could.*”
- **Education:** Every meeting should have an educational component that is based on the relevant issues of the day; and let's not forget *there's wisdom in the room.* Sharing value-added information and best practices in a public forum not only provides highly-credible education, but also enables successful team members to shine in front of their peers.

Instructions: This template is designed to be filled-out on the go, resulting in a balanced, highly-relevant weekly agenda that is based on relevant issues of the day. While each category might not be a part of every meeting, it's best to include as many categories as is practical and possible each week. Keep each agenda for a few weeks to help plan successive meetings and to ensure there are no consistent gaps.

Team Sales Meeting Agenda Template

Corporate/ HR announcements, policy statements, status reports, marketing, or business plan, etc.

Information relative to industry, competition, or bigger picture issues

Input from guest (i.e., sales ops, subject expert, channel partner, engineering, etc.)

Brief individual reports on activity, plans; “dash-boarding...”
(Track key metrics such as contacts made past week, # presentations, # orders booked, etc.)

Report on team goals and status (how are we doing vs. plan, what is going well, sales issues, etc.)

Education: selling skills, account management strategies, best practices, etc. based on issues of the day/team status

Follow-up on plans from previous meeting (if appropriate)

Plan for upcoming week or two (based on status of sales-to-date, pipeline, situation, etc.)

Problems to resolve

Consensus, summary, Q&A, feedback, and follow-up items/delegation of activities