Paul Charles & Associates
Sales Management Consultants

Sales Meeting Template

1. Start and finish meetings on time
2. Create and circulate an agenda in advance
3. Keep the discussion interactive and fairly brisk in pace
4. Follow the agenda during the meeting – stay on group level
5. Someone should take minutes and distribute after the meeting
6. Add information to the template "on the go"
7. Create separate traditional agenda for the team
8. Try to add information to all of the blocks
9. Customize the template as you see fit
10. Contact us if you have questions!

Corporate/ HR announcements, policy statements, status reports, marketing info etc

Information relative to industry, competition, or "big picture" issues

Education: selling techniques, territory or account management, best practices, etc. based on issues of the day / team status **(every meeting should have an educational component!)**

Input from guest (i.e., channel partner, management, colleague, supplier, expert, etc.)

Brief individual reports on activity, plans; recognition of team or specific Rep accomplishments

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

Plan for upcoming week (based on status of sales-to-date, pipeline, sales technique etc)

Problems to resolve

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