Sales Meeting Agenda – Tactical

Sample Agenda

1. Open Meeting
2. Share on LinkedIn and Facebook
3. Optional: Sales Contest
4. Sales Tools
5. One Great Sales Idea
6. Opportunity Processing

Open Meeting

1. State the purpose of the meeting and the desired outcomes.
2. Review the agenda briefly while stating approximate time allotted for each topic.
3. Ask if anyone has to leave early or if anyone has something they want to process or add to the agenda.

Best Practices: *Share the agenda the day before the meeting. Emphasize the confidential nature of the meeting. Use parking lot concept as needed, and be sure to end on time (if possible – a few minutes early).*

Share on LinkedIn and Facebook

Use this meeting for the entire team to share a LinkedIn or Facebook post with their network. Recommended time is approx. 5 minutes with screen share.

Optional: Sales Contests

Introduce or update your team about any sales contests.

Contests and promotions should have a clear outcome that is aligned to your sales goals.

Contests should also be appropriate for your overall culture, sales team dynamics, offerings, and customer/client set.

Use this meeting time to ensure your team understands any contests, to share results, and to provide support.

Example: *Referral Contest.*

Sales Tools

Introduce new sales tools or review current ones.

Use this section of the meeting to provide consistency and ensure adoption.

Best Practice: *Whatever you review here should align to the next two topics on the agenda.*

Examples: *Upcoming webinars, new collateral, technology training, new pricing tools, or new lead generation tools.*

One Great Sales Idea

Each week, present a sale idea that the team can use to grow revenue.

This can be presented by the sales manager or assigned to a different salesperson each meeting.

The goal is to spark thinking, to create energy, and to inspire the team with a useful idea that will directly benefit them.

Example: *Using an Ideation Worksheet to improve solution selling.*

Opportunity Processing

Have real sales opportunities ready to discuss and process as a team.

Start by having a salesperson provide context, background, last actions, and current status.

The team then takes turns asking questions and providing insights.

The primary outcome is that the salesperson has a clear next step that they commit to, with the sales manager holding the salesperson accountable.

Best Practice: *Always have one opportunity ready to share – if you are aware of your team's pipelines, then bring up specific deals you want to process.*

Contact Details

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