

Team Sales Meeting Agenda Template

Corporate/ HR announcements, policy statements, status reports, market business plan, etc

Information relative to industry, competition, or bigger picture issues

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

Brief individual reports on activity, plans; "Score-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: discuss selling techniques, account management strategies, best practices or analytics based on issues of the day / team status

Plan for upcoming week or two (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

Note: This template is designed to be filled-out on the go, thus resulting in balanced, highly-relevant weekly agenda that are based on issues of the day. While each "box" or category might not be a part of every meeting, it's best to use include as many categories as is practical and possible each week.