

### **Sales Meeting Checklist**

Preparation is an important key to providing a successful learning experience. If you want to inform, educate, motivate and inspire, a cavalier approach can be hazardous. Careful planning = desired results. The following checklist and reminders are designed to help you deal with the multitude of detail surrounding the organization of a sales meeting.

#### **General Planning**

- ✓ Prepared outline of topic(s) to be covered
- ✓ Established objectives for each topic
- ✓ Assigned/ ordered learning tools- (readings, audio, video, workshop exercises)
- ✓ Allocated the amount of time for each objective or activity
- ✓ Composed list of written questions or discussion points

#### **Prior to the Meeting**

- ✓ Developed and distributed meeting agenda
- ✓ Reviewed in advance with staff their roles will be for the meeting session (gather information, develop questions, -analyze data, record issues etc.)
- ✓ Review questions/ discussion items
- ✓ Prepare meeting room
- ✓ Arrange for flip charts, markers, chalk, tape and other presentation aids to be present
- ✓ Preview of audios/ videos has been completed and counter times written down
- ✓ Review and equipment
- ✓ Set up and test AV equipment
- ✓ Position TV monitor so that everyone has clear visibility

#### **During the Meeting**

- ✓ Focus on asking questions rather than on making statements
- ✓ Ask one question at a time
- ✓ Redirect questions back to the group
- ✓ Allow time for responses
- ✓ Thank individuals for their contributions
- ✓ Recognize that words mean different things to different people. If someone makes a remark you think may be misunderstood, ask them to clarify.
- ✓ Start an agenda item list on a flip chart (as ideas come up, record on the flip chart for future consideration)
- ✓ Turn off equipment (video, overhead) when not in use
- ✓ Use humour to reduce tension and improve communication

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- ✓ Before breaks, have the people in the group state one idea they will act on, something picked up during that period (give them one minute to review and record the idea before sharing it with the group)
- ✓ Look for opportunities to make learning more fun
- ✓ Develop a safe atmosphere - let it be known it's okay to disagree
- ✓ Focus on developing ideas instead of fishing for the "right" answer
- ✓ Ask for advantages and disadvantages of each major idea
- ✓ Continually re-focus discussion back on track
- ✓ Demonstrate patience and support for all members
- ✓ Provide individual recognition and appreciation at every opportunity
- ✓ Provide name tags if there is a chance not all participants will know each other (such as at regional or national meetings)

There are numerous other activities you can incorporate in your sales meeting to generate interest and get your salespeople involved. Try:

✓ Brainstorming	✓ Case Histories
✓ Chalkboards	✓ Charts
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✓ Conversation	✓ Debates
✓ Demonstrations	✓ Discussion groups
✓ Field trips	✓ Videos
✓ Games/crossword puzzles	✓ Interviews
✓ Models	✓ News articles
✓ Objects	✓ Panels
✓ Problem-solving exercises	✓ Projects
✓ Question and answer sessions patterned after Jeopardy	✓ Quizzes
✓ Role Playing	✓ Skits
✓ Testimonies	✓ Reports

### After the Meeting

- ✓ Distribute evaluation forms and ask that they be handed in prior to the end of the meeting - stand at the door and collect them.
- ✓ Review participants' evaluations, looking for ways to improve your presentation
- ✓ Send out a summary of evaluations and highlights of the learning session Follow up on individual personal action plans of staff Immediately plan an outline of the next session

### Meeting Room Checklist

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- ✓ Is the room large enough?
- ✓ Is it well ventilated? Air-conditioned?
- ✓ Close to washrooms? Is the line-of-sight adequate for all attendees?
- ✓ Are electrical outlets convenient? Are there enough?
- ✓ Does it have a convenient dimmer switch?
- ✓ Is additional power required for several computers or trade show?
- ✓ Do the lectern reading lights work properly? Is the ceiling high enough for screen size desired?
- ✓ Is there room to use rear projection equipment?
- ✓ Is a centre aisle cleared for front projection?
- ✓ Is the screen area protected from light spills?
- ✓ Is there room for staging?
- ✓ Will you rent from the hotel?
- ✓ Is the sound system working?
- ✓ Will existing curtains give adequate darkness?