

Every Sales Leader Should Have 5 Meetings

The suggestions below are written as though you would be conducting monthly meetings, but can be modified if you want to meet twice per month.

1. Results. The first thing to cover should be sales results. I suggest looking at your results in this order.

- ✓ Last month's results compared to monthly quota.
- ✓ Last month's results compared to their forecast.
- ✓ Year-to-date sales compared to annual quota.

Whether the sales person is killing it or struggling, they should be prepared to discuss their status with you. They should know answers to questions like: "What's led to your success so far this year?" "Why did you miss your forecast?" "What happened to those two huge opportunities?" "What are you doing on a week-to-week basis that is holding you back from performing?" "How did you bring in those last-minute sales to close the month?"

2. Planning. Once you've received the answers you need, and you feel like the sales person fully understands their business, now it's time to look ahead. Below are the items to discuss.

- ✓ Projection for this month's sales, with a list of opportunities that they feel confident in closing.
- ✓ Open Pipeline for the next three to six months (depending on your average sales cycle). Your discussion should be about the probability of reaching their sales target for the same time frame.

3. Personal Initiative. Every sales person should have a personal initiative that will improve their selling ability. The initiative should be something that takes the entire calendar year to implement. This part of the meeting should cover short term goals and an overall perspective on their progress toward their initiative. Some examples of personal initiatives are: improvement of prospecting skills, increased knowledge of IP video, or improvement in public speaking. Below are items to discuss.

- ✓ Performance against short term goals established in last meeting.
- ✓ What you can do to help, as their sales leader.
- ✓ Establish short term goal(s) to accomplish before next meeting.