

Sales Meeting Agenda

Center of Influence Network (COIN) Development

Purpose: Have Producers expand their centers of influence network and increase pipeline opportunities.

Preparation: Copy page two of this document and have enough copies for every Producer.

MEETING AGENDA

- I. Tell the group the purpose of the meeting.
- II. Distribute Handouts.
- III. Ask the Producers to go through the handout individually.
- IV. Have the Producers get a partner and have them work together to develop a final plan.
The final Plan should include the following:
 - a. Schedule out every name on your list to see between now and the end of year.
(Prioritize them and build a monthly plan as to when you will call on each one of them).
 - b. Discuss strategies to get introductions (LinkedIn research, google searches, direct referral, cold call, etc.)
- V. Bring all Producers together and ask them to express the one thing that they learned or value they gained from this session. (This is important because many times someone else in the room will learn something from what another person expresses.)
- VI. Get a commitment from each Producer on what they are going to do to improve their weaknesses and maximize their strengths. They may also use each other if those with the weaknesses lean on those with the strengths.

CENTER OF INFLUENCE NETWORK DEVELOPMENT WORKSHEET

List the names of the people that make decisions or know people who make decisions in the following relationship categories. Try to name as many people as possible:

Family

Friends and Neighbors

Organizations where you belong (Church, social, country Club, etc)

Professional Organizations (Association leaders, Professional groups, business groups)

Professional Connections (attorneys, CPA, Banker)

People not listed above that know a lot of people (Politicians, golf pro, Charity groups)

How many names did you list? _____ How many people could you call monthly this year? _____ How many will you commit to call each week? _____