

Sales Meeting Agenda

Entry Strategies

Purpose: Give Producers tools and strategies to increase the number of sales opportunities and increase closing percentage of getting first appointment.

Preparation: Ask Producers to think about how they entered into the relationship with their top ten clients.

MEETING AGENDA

- I. Tell the group the purpose of the meeting.
- II. Ask a few of the best Producers on your team to tell others what they learned when looking at how they entered into relationships with the top ten clients. (you listen for differences or similarities with these top clients and discuss with the group).
- III. Ask the group to think about the last 5 new business clients they wrote and determine how they initially engaged with them. Go deep in the questioning to have them determine:
 - a. How did I get the introduction?
 - b. What did I say that made them interested in engaging with a next step (the beginning of my sales process)?
 - c. How did the “way I entered” impact the sales process and or the sales result?
(Example: I was introduced by my CPA and that credibility allowed the prospect to have confidence in what I was offering.)
- IV. Have each person determine the following:
 - a. What should I do in the next 30 days to replicate past successes?
 - b. What is the best way for me to enter into new opportunities?
 - c. What is one way I can increase my closing skills when asking for an opportunity with a new prospect?
 - d. What is my best learning today?