

Sales Meeting Agenda

Gorilla Prospecting

Purpose: Identify and set a plan to go after the Biggest and Best Prospects in our market.

Preparation: Ask Producers to think about and bring to the meeting at least 5 (could be 10) of the most ideal clients they can think of in the market.

MEETING AGENDA

- I. Tell the group the purpose of the meeting.
- II. Have each Producer verbalize the top 5 Prospects they can think of in the market. Write these company names down on a white board or flip chart. Have every Producer give you their top 5. Do NOT include any current prospects that a Producer is currently working on.
- III. After you have finished with the top 5, go back around and ask if additional ideal prospects should be added to this list. If yes, add them.
- IV. Facilitate a discussion to come up with your ideal top 50 – 100 (you decide) prospects for the group to go after in the next 6 months.
- V. Assign producers (with them involved in the discussion) to each prospect (possibly even put them in teams to increase the effectiveness).
- VI. Have the Producers determine the following:
 - a. What month will they commit to call on each Prospect identified?
 - b. What strategy will they use to get into this prospect (referral, introduction, cold call, invite to event?)
 - c. What other team member in the organization would they see as valuable to partner with them in going after this prospect (if needed).
- VII. You capture all these answers and put it in a master document that you can track and hold them accountable. MY RECOMMENDATION: If a producer does not follow up when committed or if they are repetitively unsuccessful, switch Producers on those prospects.
- VIII. Another valuable optional activity would be to do any or all of the following:
 - a. Quantify the potential revenue of each prospect (guess).
 - b. Have competitions on number of contacts made, appointments set, dollar amounts sold, number of prospects sold, speed in which they get through all their prospects, etc).
 - c. Track the results in public. Let the organization know that these are the prospects you WILL go after in the next 6 months.