

Sales Meeting Agenda

Time Management

Purpose: Improve Producer time management to be more efficient in selling.

Preparation: Ask Producers to bring their calendar (technology is acceptable) to the sales meeting.

MEETING AGENDA

- I. Tell the group the purpose of the meeting.
- II. Put Producers in two person teams. Try to separate them from best buddies and get with people they are not as close to in relationship. (This is important because it will create stronger challenges to new ideas and not accepting their bad habits as easily.)
- III. Ask the Producers to develop a “perfect day” as a team. A perfect day is defined as:
 - a. High level of income opportunities.
 - b. Right type of prospect(s) / Client(s).
- IV. Ask the following questions (they will share answers with their partner):
 - a. What is the most money each person believes they could make (or revenue produced) if they had a “best day”?
 - b. How many days a year could they set up like this if they planned for it?
 - c. How close to their annual plan/quota would they be if they had that many days.
 - d. What would it take to set up a day like this?
- V. Ask them to pull out their calendars and look at the next two weeks. Ask the following questions and have them share the answers with their partner:
 - a. How many new/new business appointments do you have set right now?
 - b. Name at least 5 businesses you could call and get an appointment with today that you simply have not called to this point.
 - c. Have them put on their calendar the appointment to call these five companies.
 - d. In looking at your calendar, what is keeping you from being more productive.
- VI. Ask them to pick a date in the future that will be their “perfect day”. Have them set up a plan to make that day a perfect day.
- VII. Ask each Producer to communicate one thing they can do to improve their schedule to be more productive.