

Sales Meeting Agenda

Effectively Managing Pipeline Movement

Purpose: To help producers develop awareness and skills to manage consistent pipeline movement. To identify key items that help in the process of pipeline movement.

Preparation: None

MEETING AGENDA

- I. Tell the group the purpose of the meeting.
- II. Educate on the key ways to manage pipeline movement
 - a. Use stories
 - b. Have successful producers prepared to present examples of how they effectively move prospects through the pipeline
 - c. Pair the group up. Have them identify one key skill they need to work on such as meeting set up or asking to move to the next step and have them practice that. Have them go through the checklist to identify key areas of improvement. Also, have them practice their set up and take control statement for each phase of the process. As an example, the opening statement at the Executive Briefing could go something like this:

"The purpose of today is that I have some questions prepared based on my research of your company. Then I have some general strategic questions I will ask to understand where you are headed as a company. From there I will share a bit about what makes us unique and different, HOW we work and why our clients choose to do business with us. At the end of today, you and I will make a decision as to whether there is value in us moving forward to a next step. We are not a right fit for every company and not every company is a right fit for us. Today, we won't decide that, just if there is enough value in our discussion that would warrant a next step. If so, I'll share what the next step would look like and you and I will get our calendars and schedule that next step in about 2 to 3 weeks. Is that OK with you?"

STRATEGIES, THINKING & LANGUAGE

- Purposeful
 - Research before entering into the account
 - Understand your end in mind before the meeting
 - Practice before the meeting

- Be compelling
 - Differentiate
 - Focus on HOW you work and unique process of risk identification
 - Quantify your value
 - Convince them they can't get HOW you work anywhere else

- Educate
 - Open new files
 - Challenge the buyers thinking

- Take control of the meeting
 - Strong purpose statement for meeting – Lay out agenda
 - Get agreement on decision made at the end of each meeting
 - Close to that decision

Checklist of Items that Aid in Pipeline Movement

- ✓ Prepare 2 or 3 great research questions for the prospect every meeting
- ✓ Identify opportunities to educate the buyer before each meeting
- ✓ Prepare for each meeting
- ✓ Take control of the meeting
- ✓ Set expectation for meeting
- ✓ Agree on close at beginning of each meeting
- ✓ Open new files and educate buyer each meeting
- ✓ Quantify value at every meeting
- ✓ Sell HOW you work and your unique process
- ✓ Avoid selling services only
- ✓ Challenge the buyers thinking
- ✓ Help them realize they can't get this anywhere else
- ✓ Close to the next step agreed upon when you set up the meeting

Call to Action:

Ask each Producer to communicate one thing they need to do (or more) to effectively manage their pipeline.