

Sales Meeting Agenda

Team Communication

Purpose: Help Producers realize they can maximize their productivity and provide a better client experience through improving communication skills with their team.

Preparation: None

Facilitator: Begin the session by stating the name and purpose of the session. Then, break them up into small groups of 3-4 people.

Give the groups the following scenarios (groups have at least 3 scenarios and they can be the same as other groups) and ask them to answer the following questions:

Who?...
Needs to know what?...
By when?
Why?

SCENARIO NUMER 1:

I am working on a new piece of business and I have received the go ahead from the prospect to present their plan.

SCENARIO NUMER 2:

I receive my client renewal list 120 days out from effective date. The renewal process impacts several team members.

SCENARIO NUMER 3:

You have just written a new client.

SCENARIO NUMER 4:

You receive service requests from clients (phone, email, etc.). This request requires a change.

SCENARIO NUMER 5:

You are unexpectedly going to be away for a few days and will have limited access to the office.

FACILITATOR REMARKS:

The number one issue in almost every company is communication. While leadership plays the biggest role in fixing any communication problems, we all can play a role in improving it. Here are five things to make you a better communicator:

1. Build rapport and get to know people – people communicate best when they feel safe and trusted. Rapport is built by building relationships and cultivating shared perspectives.
2. Explain – taking time to explain and give a brief background on what you are trying to get accomplished allows a message to be received much clearer. Always have them playback what they heard.
3. Feedback – we have to feel comfortable as a team to share feedback. We have to create an environment of where our teammates feel safe to share their thoughts with you and vice versa.
4. Act on feedback – feedback is only good if you do something with it. Great teams act on what everyone is sharing so they can get better results. By listening (seeking to understand) to all perspectives and taking the information in we are able to make better decisions moving forward.
5. Face time – face time in communication can be underestimated at times. I am not saying all the time but face time (even if that means video) allows you to create more intimacy with your teammates.

IN CLOSING:

Everyone needs to own communication and better relationships will improve communication. Always ask the following at the end of every meeting and every activity: Who...Needs to know what....By when?

CALL TO ACTION:

Ask each Producer to communicate one thing they need to do (or more) to improve their communication with their team.