

10 Secrets to a Successful Sales Meeting

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A successful sales meeting is possible, and the below secrets will help. On the following pages, I explore each idea with more depth.

- 1. Spend time focused on one hot issue.** Don't try to cover every single issue. If you try to cover everything, you really won't be digging into the important issues to the degree that you need to.
- 2. Recognize performance.** Salespeople love recognition. Have a process in place that people can look forward to as being their time to shine.
- 3. Announce ahead of time the agenda and topics to be covered.** Make people come prepared and hold them accountable.
- 4. Start on time. End on time.** Salespeople are expected to respect their customer's time, right? You should do the same with your sales staff.
- 5. Follow up on individual items after the meeting, not during the meeting.** Don't waste everyone's time at a meeting by spending time dealing with one person.
- 6. Allow for discussion and input.** A sales presentation without input from the customer isn't much of a sales call. Same goes for a sales meeting. Allow people an opportunity to discuss.
- 7. Keep to a minimum the time allocated to supply-chain issues, volume updates, etc.** Meetings that are nothing more than updates will be seen by salespeople as a waste of their time.
- 8. Reach agreement on specific next steps.** Don't leave things hanging. We ask salespeople to be accurate with how they close a sale to ensure the customer knows what they will and will not be receiving. The same thing goes for how we run a sales meeting.
- 9. Allocate time at each meeting for a "personal growth/training" activity.** Use the time together as an opportunity to help people improve their selling skills.
- 10. Motivate the team and build culture.** For most salespeople, the sales meeting is their biggest interaction with you and the company as a whole. Make sure they leave with a positive state of mind.

1.

Spend Time Focused on One Hot Issue.

People who are successful get that way because they're focused. They attack issues with a laser-like focus and are committed to seeing the situation through to the end. This same thing should apply to how we deal with major sales programs or any major issue the sales force is facing.

Too many times the agenda of a sales meeting winds up getting filled with far too many items. What winds up happening is it becomes a huge checklist you're merely racing through to complete in the time you have. When you wind up doing this, you accomplish nothing.

The salespeople leave even more confused than before.

The best way to carry out the single specific task is by having one salesperson at each meeting offer up one issue or opportunity they're facing -- and then have the rest of the team brainstorm solutions.

You'll be amazed at how effective this process is once people begin to see results. The best way to do this is by allocating 15 minutes to the entire process. The salesperson presenting the opportunity is given one minute to share the situation. Do not waver from that, as time is valuable!

Then give the rest of the team 12 minutes to openly discuss the issue. Again, limit it to 12 minutes. Final two minutes is given to the salesperson who presented the situation to then recap what they heard and how they will use it.

This 15-minute approach to problem solving is incredibly effective.

I've shared this approach with sales managers and have used it myself on many occasions with teams. Once a sales team gets used to this 15-minute problem solving drill, you will have no problem finding salespeople who want to offer up an opportunity for discussion.

If you can't for one reason or another use the idea I've described above, then you can use the more traditional approach of time allocation by setting aside enough time for the issue you deem the most important.

Allow time for the sales team to discuss their concerns, and most important of all, make sure to bring the discussion and the topic to a defined close. It is vital that people understand the expectations and are held accountable for any follow-up actions.

I've found if salespeople leave a sales meeting with only one clear objective they understand well, the success they have will far exceed the salesperson who leaves a meeting with a laundry list of items they don't understand.

Use the outcomes and expectations of this specific topic as a key point to follow-up on the next time you meet.

Results will always increase when salespeople know they're being held accountable. The key difference is they will more readily embrace what they're going to be held accountable for when they feel they have been able to contribute to the process.

Both of these approaches are effective, and many sales managers embrace both in each sales meeting.



2.

Recognize Performance.

Salespeople love recognition, so you need to have a process in place that people can look forward to as being their time to shine.

You should never have a sales meeting without publicly recognizing salespeople for their performance.

Even if you send out emails with sales numbers or use any number of other communication tools between meetings, you still should take the time to recognize people anytime the sales force is together. This would include in-person or via conference calls or internet web meetings.

Have a regular approach to recognition, such as last week's volumes, new accounts opened or other key measurements you use that would allow you to praise people who achieve exceptional results.

When you're recognizing your own sales team, also take the time to call out and praise others in the company for their contribution, even if the people may not be present at the meeting.

By recognizing others in the company, you're helping to create a team environment, which your sales team will see. As they see you complimenting and thanking others, they too will begin to do the same. Obviously, this will increase the respect and support the sales organization receives from others in the company.

As part of the recognition process, ask those you recognize to share how they achieved the results. This simple action allows them to feel good, and it also serves as a great way for ideas to be shared among the team.

As simple as this step is, it is overlooked by the vast majority of sales managers, which is too bad because it can serve as a huge catalyst for the sharing of ideas that ultimately make the company as a whole better.

If your sales team works in the same building, create a small trophy the top performing person can have by their work station for the week. Make the trophy a "traveling" trophy where the person who received it at the last meeting brings it to the current meeting and then presents it to the next recipient. Again, this is very simple, and over time it can create a huge amount of fun for the team as they each try to earn the award.

The best awards are those that are the most unique. Some of the most creative ones I've seen include a small stuffed pig, an ugly broken bowling trophy, or a busted clock. Idea is to have a process that becomes part of the sale culture that not only is fun, but also genuinely draws attention to good performance.

Recognition is a must in a sales meeting, and it will go a long way to increase overall sales motivation on your team.

3.

Announce Ahead of Time the Agenda and Topics to be Covered.

Make people come prepared and hold them accountable.

Of all the things it takes to make a meeting effective, this one is really one of the easiest and yet far too many times it's overlooked. The reason I believe it's overlooked is because it is so simple. Even worse than a meeting without an agenda is a meeting agenda that is unchanged from week-to-week.

Every moment a sales manager spends with their people is a teaching moment, and having an up-to-date agenda for every meeting is just that – a teaching moment. When your salespeople see you conducting meetings with an agenda, it makes it much easier for you to hold them accountable to have an agenda for their sales calls.

Let's get beyond the teaching value of an agenda and discuss the value it brings to a meeting. When the agenda is distributed to the attendees prior to the meeting, it allows them to come prepared and ready to discuss.

Salespeople should not be given a "free pass" if they're not prepared when the agenda has been made available in advance. Holding them accountable is fundamental, as it will allow the meeting to be more productive.

When the agenda is being put together, be sure to include exactly what is going to be discussed and what salespeople will need to bring to the meeting. Don't overburden them with what they need to prepare.

If they're asked to prepare information that is never discussed in a meeting, the credibility of the meeting agenda and even you will be hurt. At the same time, if you routinely bring additional subjects up in the meeting that are not on the agenda, the sales team will begin to discount the value of the agenda.

Use the agenda for what it is – a tool to help keep things focused and for everyone in the organization to see the value of being organized. Good organization shows leadership.



4.

Start on Time. End on Time.

Salespeople are expected to respect their customer's time, so you should too.

The number of sales meetings I've attended that do not start on time is appalling. When I've asked sales managers why their sales meeting is starting late, I most likely get a lame excuse about how that's the way we've always done things. The question that immediately comes to my mind is, "Do the salespeople exhibit that same behavior with their customers?"

Sales meetings are to the sales manager what a sales call is to a salesperson – they're important and not to be taken lightly. Salespeople base a large part of their feelings and attitude on how they see their sales manager behaving. That means if we expect salespeople to be on time for sales calls, then we need to be on time with our sales meetings.

The same thing applies to ending a sales meeting. A big part of why I push this is because it forces people to be organized and ready. Again, I see too many salespeople showing up for their own sales meetings completely disorganized. If necessary, put specific times by each major item you're going to cover in a meeting. I do this with any meeting I'm conducting. It allows me to stay focused and it also helps to keep everyone else focused.

Modeling the behavior you want your salespeople to show toward their customers is one of the easiest ways for your people to learn from you. Being a stickler for starting and finishing on time does not mean the meetings are going to be a bore and they don't mean they're not going to be engaging and spontaneous when necessary. Both of these are still possible, and by being able to do both of these and still remain within the allocated time is a strong demonstration of leadership.

If you're wondering if a meeting can ever go beyond its scheduled ending time, the answer is yes – but not on a regular basis and only with the permission of those in attendance. Again, this is no different than what we would expect a salesperson to do on a sales call. If the presentation is scheduled for 30 minutes and it's going to run long due to the level of discussion, that's fine, but only if the salesperson has the permission of the customer.

Demonstrate leadership with your next sales meeting by starting and ending on time. If this is a new trait for you, do it for 3 or 4 meetings and I can assure you that your sales team will start to model the same behavior.

5.

Follow Up on Individual Items After the Meeting, Not During the Meeting.

Don't waste everyone's time at a meeting by spending the time dealing with one person.

Ask any of the members of your sales team what bugs them, and one of the items on the list will surely be having to attend a meeting where far too much time is spent going over individual items, one person at a time, all for the sake of keeping the sales manager happy. Let's see time for what it is – valuable. Use it as the business tool it truly is.

Asking a person for a quick update is one thing, but going around the room asking everyone to give their updates on things can quickly turn into a real drag for everyone involved. Yes, you do want to hold people accountable, but there are other ways to do it.

One way is to have them send to you as part of their pre-meeting preparation their updated numbers, which you can then publish to everyone. Let them read the numbers in the meeting rather than spending time announcing them. By having people submit to you in advance the update you're looking for, it will also allow you to be more prepared so you know how to respond and deal with any issues.

By following up with people one-on-one after the meeting regarding specific issues, you will dramatically improve the level of accountability on the part of the sales team. Following up one-on-one will give you the time you need to discuss with more depth a specific issue that needs to be handled.

All it takes is for your sales team to realize you're following up with them immediately following the meeting and you'll be amazed at how much more prepared they are. It will only take a single "get serious" meeting for people to realize how not only do they need to be prepared, but they also better step up their performance – or they will be having another "get serious" meeting with the boss.

This approach provides you as the sales manager with an effective and timely approach to follow up on what you expect. By doing it immediately following the meeting, you will set in place a standard procedure with which you lead your organization.



6.

Allow for Discussion and Input.

A sales presentation without input from the customer isn't much of a sales call. Same goes for a sales meeting. You need to allow people an opportunity to discuss.

Salespeople want to feel like they have input, and when they're given the opportunity to share their views, it allows them to have ownership in the process. There's not a salesperson out there who will not be more effective when they feel they have a sense of ownership in what they're being asked to do.

Allowing time for discussion doesn't mean it needs to turn into a gripe session, but it does mean you need to allow people to share their views. Key is in allowing people to share their views, including negative opinions, but to do so in a constructive manner that includes a solution.

It's your job as the leader to be able to guide the discussion. This does not mean you allow the inmates to take over the prison, but what it does mean is you ensure there is time in the meeting for input from people.

In the end you're the leader, and a leader will ultimately make the decision and communicate it in a manner the organization both understands and can execute. This is why you're in the position you're in – to lead the team in the decision-making process.

It's how you lead discussions that will determine how well your team accepts you. No, this does not mean you give in to what they want. What it means is you respect the input of each person just as you expect each person to respect each other, and in the end, you make the decision. The decision you make may not change one bit even after input from the team, but even if that's the case, let them know why and reassure them you heard them and respect their thinking.

The key to making this work is you. I view it this way: managers manage tasks, leaders lead people. If you only want to be a manager, then don't allow input. On the other hand, if you want to be a leader, then allow it. Your team will thank you for it, and in the end by allowing them to be able to share their views, you will give them more confidence in the final decision.



7.

Keep to a Minimum the Time Allocated to Supply Chain Issues, Volume Updates, etc.

Meetings that are nothing more than updates will be seen as salespeople as a waste of their time.

Nothing can be more boring for a salesperson than sitting in a meeting where the discussion is on inventory, shipment updates and all of the hassles that typically occur on a regular basis in every company.

Yes, it's important for salespeople to be aware of what is or is not happening; however, when the sales meeting becomes nothing more than a meeting about logistics, then something is wrong.

Many of these issues can be handled better by distributing reports ahead of the meeting and asking for team members to review them beforehand. Yes, I know there is an argument that they won't bother to look at them, but all it takes is for them to experience a few times of you no longer going through reports like that during the meeting and you'll be amazed at how they start looking at them.

Use your meeting time to deal only with the special situations – the unique items that require some discussion or direction. Your objective is to be able to cut down the total amount of time normally spent on items like this to allow you to have more time to discuss the hot topics and key issues that a lively discussion could result in effective solutions.

This is another key difference between sales managers and sales leaders. Sales managers want to review each and every number during the meeting. Sales leaders are concerned about what the numbers mean and how they can be impacted. Spend your time dealing with the exception and not the norm.

To accomplish this, you may need to stop having people from Logistics, Operations or other departments attend all of your meetings. This might take some one-one-one discussions between you and other department heads, but making the change will help you and your sales team immensely. You still can have these people attend, but now you have them attend only on occasion and only when you have time allocated to allow for discussion of only the key issues that involve them. Whatever you do, never allow control of the meeting to shift from you to another department head. You're the sales leader, not some person from Accounting or Operations.

8.

Reach Agreement on Specific Next Steps.

Don't leave things hanging. We ask salespeople to be accurate with how they close a sale to ensure the customer knows what they will and will not be receiving. The same thing goes for how we run a sales meeting.

Leading a sales team can at times feel like trying to herd cats. If you want chaos among a sales team, whether it be a strong team or a weak team, all you have to do is not be 100% clear about your expectations are and what needs to be done. Salespeople by nature are individual thinkers, and unless guided, they will very quickly start making changes in things based on how they see things.

Be 100% up front with objectives and be equally clear with the sales team as to what they need to do to achieve the objectives. This is the number one reason to have a sales meeting. It's not to update numbers and it's not to see how people feel. It's about making sure they leave the meeting with a clear understanding of what they need to do.

Best way to accomplish this is by identifying these items in the meeting agenda and then use the allocated time to review specifically what needs to be done. In an earlier step I talked about how you use time after the meeting for individual follow-up, and this is the precise reason why the individual follow-up occurs after the meeting. Doing so allows you to do another "check off" with each person.

Yes, your people have goals they need to accomplish, but so do you and in order for you to accomplish your goals, you need the collective engagement of each person doing what they're supposed to be doing.

This one step of being clear about the goals and how they're going to accomplish them will return a higher return on investment on your meeting time than nearly every other activity.



9.

Allocate Time at Each Meeting for a “Personal Growth/Training” Activity.

Use the time together as an opportunity to help people improve their selling skills. Sales training must be seen as a key activity of the team and it must be part of the team’s culture. Each time you assemble the team for a meeting, allocate time to a specific training activity. It does not have to be complex or long. My suggestion is to keep it very tight and just deal with one specific item each meeting.

Keeping the activity or training focused on a very specific item allows for greater concentration by the team. Your objective is for each person to leave the meeting having learned something new and more importantly knowing how they are going to use it in their job. The item might be a new closing technique or a new approach to leaving a voicemail. The activity doesn’t have to be complex. Key is your people gain knowledge from something each time you meet.

As you make this a regular part of your sales meetings, your sales team will begin to realize the importance of on-going development and they will begin to embrace not only the training you do during the meeting, but they also will begin looking for others way to improve their skills.

Vary how you do your training. Use different approaches. Some options include group discussion, small team review, role-play, worksheets or activities that get them up and moving around. The most effective training long-term is training that sticks and is applied, and this may also mean a subject will need to be repeated from time-to-time. Remember that repetition is how we learn best, and it takes quite a bit of repetition before anything becomes a habit.

One technique that can be very effective for training for small companies with a limited budget is to have the team read a book on sales, with the goal being to discuss for 10 minutes at each meeting one more chapter of the book. This can be a great way to get people to see the merits of using outside resources to improve their skills.



10.

Motivate the Team and Build Culture.

For most salespeople, the sales meeting is their biggest interaction with you and the company as a whole. Make sure they leave with a positive state of mind.

You as a sales leader spend the bulk of your time interacting with others in the company. Your salespeople typically do not. This makes the sales meeting that much more important. Your salespeople are using the sales meeting as their measurement tool to determine how they feel about the company. This includes their willingness to go the extra mile – or to work as minimally as possible.

Never underestimate your overall objective is to ensure your salespeople leave the meeting motivated, energized and focused to go out and make it happen. To do this, you have to remember that nobody can motivate anyone. The best they can do is to create an environment where people will want to motivate themselves.

What this means is your team has to see you as a motivated person and one who is supporting them each day and not just during a meeting.

Positive people attract positive people in the same way negative people attract negative people. Worse yet is that negative people will try to tear down positive people to help make themselves look good. Everything you do in the meeting must have a positive focus. This does not mean you avoid the tough discussions. You can still have them, but when you're done with the discussion, you have to wrap it up in a positive manner.

A great technique to help people feel motivated is to ask members to share a recent success they had or to share a goal they're working on and how they intend to accomplish it. By allowing others to be involved, you build a positive culture and it encourages people to learn from one another.



Length of Meeting?

“How long should a sales meeting last and how frequently should I hold them?”

This is a question I get asked a lot, and my response is for most organizations, a sales meeting should be held once a week, typically Monday morning. The reason I like Monday morning is it can serve to jump start the team and motivate them to go out and accomplish the goals for that week.

The length of the meeting is entirely up to the group. For many companies, it can be as short as 45 minutes. I don't believe the weekly sales meeting should ever last more than 90 minutes. A 45-minute meeting allows enough time to do training for 15 minutes, do a deep dive on a critical issue for 15 minutes and cover a few select updates in the remaining 15 minutes.

Surprising to most sales leaders is how much can get done in a 45-minute meeting if they and their people come into the meeting prepared and ready to deal with the agenda items.

Getting the team together “just because that's what has always been done” is not a reason to meet. The need for being organized is essential, and when a meeting is run properly, the results you'll begin to see can and will be amazing.

Now, back to the reason I like Monday as a meeting day. Mondays for most organizations are somewhat of a quiet time, because in many industries, attempting to make sales calls on a Monday morning is just not doable due to how customers use their Monday mornings.

There is a very good reason to use Monday mornings for sales meetings and that is to get your team moving. Too many salespeople use Monday mornings as “preparation time.” The problem is that “preparation time” for them means it's their time to dink around and slowly gear up for the week. Sorry, but that means they are wasting Monday mornings, and if that's the case, let's use it for the sales meeting and get things going.

Yes, there are going to be exceptions to a Monday morning meeting. For some industries, Monday morning is the busiest time due to phone calls or orders that have come in over the weekend. If that's the case, then adjust accordingly.

Whether the sales meeting is in-person, on the telephone or on the web with webcams, the objective is the same – keep it tightly focused and ensure people leave motivated to make things happen.

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I am committed to helping you build a successful sales environment where salespeople are motivated and committed to strengthening their skills.
