

**FOR: Bank Sales Managers**

## Getting the Most Out of Weekly Sales Meetings

One of the best-selling business books of the new millennium has the ominous title of “Death by Meeting.” If you’re not looking forward to your next Monday sales meeting with your team, here are a few ideas that Buck Bierly shared in a recent webinar.

1. Prepare for the meeting. Review each team member’s pipeline report, closed business report and upcoming scheduled calls to build a message for the meeting. Pay attention to the following:
  - In what categories is each salesperson ahead or behind in his goals?
  - Is there appropriate top-of-funnel activity?
  - Where does he need help in closing deals?
  - Does the balance of proactive and reactive sales activity for the coming week match your expectations?
2. Craft a memorable (if not necessarily original) message around lead generation and pipeline. If stuck, you can always fall back on, “Our pipeline isn’t where it needs to be at this time of the year. What are we going to do this week to generate more leads?”
3. Determine how you are going to engage each sales team member in the meeting. You should plan on one or two specific questions that will make people think and comment. These can be along the lines of:
  - Initiatives this week to build pipeline
  - Activities to close business
  - Upcoming calls that require your assistance
4. Build in some variety each week. Ask a team member to provide an update on a competitor or give a quick overview of research on an important industry in your market. Have a product partner review how she would position a product for one of your team’s prospects. Go over a call plan or account plan.
5. Take good notes for one-on-one follow-up with individuals. Don’t try to solve every sales problem in the meeting. There are certain topics that are better broached later.

6. Solicit suggestions about what topics your team would like to talk about in future meetings. The meeting is, after all, designed to make them more effective in their jobs so asking them what they'd like to focus on makes good sense.

