What To Cover In Weekly Sales Meetings

Many clients ask for help in streamlining their sales meetings processes. Here are some effective methods…

Weekly Salesperson Status Report – Set a specific date/time that weekly status is due so the Flash Report below is complete. Make it super easy for the salesperson to submit their weekly status, and also ensure it is clear that to be on the sales team this is what we require weekly:

- # new customer orders and details ($ amount, product/services, etc.)
- # new existing customer orders and details ($ amount, product/services, etc.)
- # new prospects and details (expected $ amount, sales stage, next steps)
- [whatever else you require]

Weekly Sales Flash Report - To cover each week with the sales team on group huddle (recap on email post-meeting so everyone remembers what was covered).

- Summary sales activity per salesperson: how many orders at what stage of sales process, total $ per salesperson per stage, total velocity (movement from one stage to the next each week)
- Winners for the weekly contest (whatever behavior you are currently incenting: new orders, upsells/down sells/cross-sells, specific product/service sales, fastest to report sales status in the CRM, etc.)

Weekly CRM Update – Make sure all salespeople know what data needs to be entered in the CRM after each sales call. For example: sales stage movement for the week, notes per call/communication with prospect, proposal info and all sales activity info above. Some clients have their customer service reps do CRM data entry for salespeople as a reward once a certain sales performance level is achieved.

Some of our clients like to set up a Google doc or other repository to help celebrate sales people (as well as all other team members). On the doc each employee fills in their section listing what treats (under $200) they'd like to receive for terrific performance. Make this public so all can see and use, and you'll find leaders have a much easier time providing fun and meaningful incentive gifts.