



Management Group, Ltd.

Building organizations through the execution of strategic sales management

Acumen Management Group, Ltd
Sales Meeting Focus

Focus/Discipline/Measurement!!!

Date: _____ For Month Ending: _____

Attendees: _____

Topics to Discuss at the Sales Meeting: (these are your Mgmt. Topics)

- 1. _____
- 2. _____
- 3. _____
- 4. _____

Individual Salesperson Review:

Go around the table:

- ✓ "Rate previous week 1-5" and ask for current success stories
- ✓ Assign a sales 'secretary' to take notes and type up email on key points of the meeting.

Status of Each > \$50K and \$100K Prospect in Funnel:

Rep	Account	Next Step	Amount\$	Month Close
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

Sales Management Actions:

- _____ Sales Metrics Completed?
- _____ Sales Lead Analysis Performed?
- _____ Individual Salesperson meetings held?
- _____ SFA/CRM Database Files Being Updated Properly?
- _____ Product/Installation/Technical Updates?
- _____ Major Prospect Meeting Dates
- _____ Celebrate Success! <<OK in group>>

Goals for this Month	Achievements for this Month
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Bookings: _____ Bookings: _____ % _____

Goals for Past Month	Achievements for Past Month
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Bookings: _____ Bookings: _____ % _____

Monthly Sales Metrics and Achievements

(this could be done by Salesperson too, each person should come to the meeting prepared to discuss their own numbers)

Current:

Total Value of Funnel 90 days (\$) _____
 Total Number of Opp. In 90 days (#) _____

This Month-to-date:

Number of Proposals (#) _____
 Value of Proposals Outstanding (\$) _____
 \$\$ Values of Orders: (\$) _____
 Total Number of Demonstrations (#) _____
 Total Number of F to Face Calls (#) _____

Prior Month:

Number of Proposals (#) _____
 Value of Proposals Outstanding (\$) _____
 \$\$ Values of Orders: (\$) _____
 Total Number of Demonstrations (#) _____
 Total Number of F to Face Calls (#) _____

Marketing Plans Executed for this month

- Product Promotions: _____
- Trade Shows _____
- Mailings: _____
- Customer Relationships _____
- Email _____

Marketing Plans to be executed next 60 days (note RD name)

- Product Promotions: _____
- Trade Shows _____
- Mailings: _____
- Customer Relationships _____
- Email _____

Training Plans for Team Next 90 Days:

- ✓ Product
- ✓ Sales Skills

Admin/Shipping/ Technical Issues to Discuss:

Potential Market Issues That Could Impact Revenues

Fun/Contests Planned

Close Meeting:

- ✓ Go around the table ask for Positive Mental Thought from each person