Worksheet: Agendas

Agendas Development Practice Guide

Overview

The agenda is one of the most important elements of the sales call and needs to be thought through and prepared in advance. A well prepared and delivered agenda accomplishes several objectives including:

- It shows the person(s) you're meeting with you're prepared, professional and competent
- It establishes early on who will be leading/facilitating the meeting. If that person is you, it allows the people you're meeting with to know an important dynamic to the meeting.
- If done right, it can elevate the energy, importance and overall atmosphere in the room.
- It gives everyone in the meeting a quick moment to transition mentally into the moment, away from what they were doing just before the meeting
- It forces us to think through our objectives and focus our meeting

How to Prepare Your Agenda

1. First and foremost, go through the Compete Selling pre-call checklist. This will give you the absolute best chance of preparing a strong and focused agenda.

2. Think in terms of what's important for the people you're meeting with? The best agendas are customer focused. All too often the agenda focuses on what the salesperson's interests are and that's a mistake.

3. Think through the sequence or flow of the meeting. What would be a good sequence to get interaction, raise energy, lower resistance and increase receptivity to your ideas? Generally speaking, it's good to get the prospect or customer TALKING early in the meeting.

4. In many cases, it's good to discuss and confirm (via email) the agenda in advance.

Tips to Communicating the Agenda in the Meeting

- The first part of the agenda is actually the transition from preliminary pleasantries to the agenda. One of the best ways to do this is to mention a strength of the person(s) you're meeting with as a bridge into the business meeting.
- Avoid over-using the phrase … "what I'd like to do" … or … "what I'd like to cover today" … This is YOU-focused and not customer focused.
- Ideally, the agenda is quick, bullet oriented and focused on what matters most to the prospect/customer.
- A good phrase to consider in the agenda is … "in thinking about how to make this meeting most useful for you, I'd suggest we cover these items in our meeting …"
- The first item in many agendas is often a quick introduction of everyone in the room. If this is the case, show everyone how to make a quick introduction by going first.
- Most agendas start with either a summary of what happened in or since the last meeting or some discovery questions to get a better understanding of what's important to the prospect/customer.
- Remember to confirm the agenda before proceeding forward and asking if anything else needs to be covered.
- If your meeting is to present some ideas or a solution based on what you've already learned, be sure to summarize first the needs and situation to get the prospect/customer in the right mindset for your recommendations.

Building Better Agendas Practice Worksheet

Step One - Identify a meeting you have where you'll need an effective agenda

People Attending:	
Time & Date:	

Step Two - Go through the Compete Selling pre-call checklist and brainstorm all the major areas you'd like to cover in the meeting. Then, sequence those agenda items in the most beneficial way.

Listed here are some typical agenda items salespeople use on a high percentage of sales calls:

- Summarize where you are in the process if you've met this prospect or customer before
- If first meeting, begin with a brief overview of your background (quick introduction)
- Ask questions to find out more about the customer/prospect's needs
- Bring a new person (specialist) into the meeting, often from your team, to present new information, perspective or ideas.
- Share some recommendations you may have prepared for this meeting.
- Confirm some details that will have an impact on your proposal or recommendations
- Go over some specifics related to your recommendation or proposal
- Identify areas the customer may need more information or details on

Other Possible Objectives:

Step Three - Outline Your Agenda

What can you say to transition into your Agenda? (think of a strength you can mention)

What are the objectives/details you have identified for this meeting? (customer focused)

How will you ask for input and/or confirm the agenda before moving forward?

What Agenda Item will you start with and what will you say to transition into it?

Step Four - Practice communicating this Agenda until you can deliver it in a natural, conversational way.