Agendas for better

meetings

a guide for sales managers

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Why should you care?

Every sales manager has a few crucial regular meetings with the people on their team.

Whether it's a 1:1 check-in with a rep, a weekly pipeline review or deep dives on coaching a specific skill, each session should have structure.

> Your biggest risk is *always* the temptation to just talk about *deals*

Since you expect a different outcome from a 1:1 than a pipeline review, start with a clear picture of the purpose.

Using a template prevents being sidetracked by the "issue of the day" (because we know there's always a fire to put out).

Plus, having a standard approach to each type of session means **everyone's clear on what's expected from them** every time.

Read on for a guide to three of the most important types of sessions...

Pipeline review

Understand and coach pipeline health

Topic	What to cover
Pipeline overview	Is there an appropriate amount in each stage of the seller's pipeline? Do they have enough coverage overall to cover quota? Are they creating new opportunities? Are they moving opportunities through stages, has anything stalled out?
Deals to note	Which deals are progressing and make up their commit? Which deals are stuck and need manager assistance? Are there any outlier deals that should get attention, like larger value or high profile prospects?
Actions	Are there any outstanding actions from previous sessions? What does the rep need to do based on this session? Is there anything for you (the manager) to do now?

1:1 check-in

Keep an eye on development and wellness

Topic	What to cover
Rep input	How have things gone since our last meeting? Any wins to note (not just deals)? Any challenges that have come up?
Manager feedback	Did you spot anything in their work to suggest an area of focus for development? Any wins or behaviour to be commended? What examples can you share to illustrate your feedback?
Actions	Are there any outstanding actions from previous sessions? What does the rep need to do based on this session? Is there anything for you (the manager) to do now?

Coaching session

Develop skills in a specific area

Topic	What to cover
Why are we here?	What do you want to help them improve? Why is that important?
Examples	What metrics or behaviour examples can you bring to highlight the need for change?
Rep input	Are there issues that they want to highlight related to this area? Do they have any specific questions or requests?
Actions	How can the rep develop based on this session? Is there anything for you (the manager) to do now to support them?

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You don't need to use our software to apply this advice, but we'd love it if you did!

Ctrl.io is a **data driven sales management** tool.

Most software gives you metrics and dashboards, leaving you to use docs to manage the conversation manually.

But we bring the numbers into the conversation so you can create accountability and follow up - because that's what really drives performance.

Find out more at ctrl.io