

SBMA's Sales Management Guide

Meeting to Succeed

Building Material Sales Team

Meeting Agenda Idea

S.W.A.T. Your Most Strategic Deals

Dear Building Material Sales Leaders,

This week's agenda is going to give some focus to your more strategic or complex deals. There are always deals that mean a lot to an organization either from a strategic point of view (breaking into a commercial, industrial or military construction project, long-time prospect, competitor's customers, etc) or from an economic point of view (a really big deal!). Either way, these can and should be handled a bit differently than your average deal. The S.W.A.T. team approach will ask your team to examine what makes a deal different and what Weapons and Tactics they have at their disposal to use to win these unique deals. By the end of this meeting, you'll have a S.W.A.T. Team approach for your next strategic deal.

Enjoy the work.

Thank you,

Larry

PREWORK ALERT:

1. Read through AGENDA to prepare for each topic and learn your role in the meeting.

AGENDA

Meeting Success Team Members:

Timekeeper: _____ (Should be a different person each week.)

Scribe: _____ (Should be a different person each week.)

Welcome/Set up for Success

Duration: 10 Minutes

Meeting Success Team - Topic Leader: Sales Manager

Objective: Organize and start meeting.

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- Welcome
- Review Agenda and Meeting Success Team assignments
- As a team, review this sales team meeting agenda and set a goal for this meeting.

Goal of Meeting:

S.W.A.T. Team Approach to Strategic Deals

Duration: 40 Minutes

Meeting Success Team - Topic Leader: _____

This week's agenda is going to give some focus to your more strategic or complex deals. There are always deals that mean a lot to an organization either from a strategic point of view (breaking into a new vertical, long-time prospect, competitor's customers, etc) or from an economic point of view (a really big deal!). Either way, these can and should be handled a bit differently than your average deal. The S.W.A.T. team approach will ask your team to examine what makes a deal different and what Weapons and Tactics they have at their disposal to use to win these unique deals. By the end of this meeting, you'll have an arsenal of Special Weapons and Tactics to use as needed to win those important deals.

As a team, list the characteristics of a "strategic" deal. A strategic deal is a deal that makes sense to win for good business reasons. Maybe it's a foothold into a competitor's territory or into a vertical market or they can refer you into more business. It may be a small deal in terms of dollars, but it's the first piece of business in a large company and, therefore, a chance to prove your services.

Characteristics of Strategic Deals:

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____

List the strategic deals your team has pursued in the past year.

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1. _____
2. _____
3. _____
4. _____
5. _____

What approach did the sales person and company take to try to win the above strategic deals?

1. _____
2. _____
3. _____
4. _____
5. _____

On every deal, salespeople have a variety of Weapons and Tactics to use to win a piece of business. For Strategic Deals, take a S.W.A.T. approach and list your Special Weapons and Tactics available.

Special Weapons– What tools or “weapons” are available for salespeople in your organization who are trying to win a strategic deal? (This could be a senior executive’s involvement, a financial analysis not usually performed, a subject matter experts, etc)

1. _____
2. _____
3. _____
4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____

Special Tactics– What activities or “tactics” are available for salespeople in your organization who are trying to win a strategic deal? (These could include a trip to visit a customer, a plant tour, a customer testimonial, etc)

1. _____
2. _____
3. _____

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4. _____
5. _____
6. _____
7. _____
8. _____
9. _____
10. _____

Who on the team has used any of the above Weapons or Tactics? What were the outcomes of those experiences?

What deals are currently in the team's pipeline that require a S.W.A.T. approach?

1. _____
2. _____
3. _____

As a team, determine which combination of weapons and tactics from the lists above should be used and create a game plan.

As a team, treat your strategic deals with your S.W.A.T. Team Approach.

Action Items/Team News

Duration: 10 Minutes

Meeting Success Team - Topic Leader: Sales Manager

Sales Manager - Share team/company/industry topics.

Action Items:

What is one action each participant will take after this meeting?

The team should decide if the meeting goal(s) was met? If so, great. If not, why? What should be done differently next time to make sure the meeting goal is met?

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REINFORCE, ADVANCE & APPLY

Bring Building Material Sales Team Meeting Topics to Life in the Field

Sales Managers, use the following ideas to reinforce, advance and apply the lessons from today's sales team meeting.

1. Make sure your team is aware of all the *weapons* and *tactics* available to them. As new ones are available, make them accessible.
 2. What *Sales Management* weapons and tactics are available to you? How can you use those more effectively?
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FIELDWORK ASSIGNMENT

Applying your Sales Meeting Topics in the Field

The Field Work Assignment is optional homework. The objective is to apply and practice the lessons from your weekly sales team meeting.

Get comfortable with a new weapon and tactic this week.
