A Team Leader's Guide to a Successful Sales Meeting

How to Shine as a Team Leader and

Take Your Agents to the Next Level.

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GOAL OF A SALES MEETING

To Motivate, Educate, Inspire, and Inform

Each sales meeting has the potential to motivate, educate, inspire, and inform agents in various ways. Your objective when holding a sales meeting is to successfully complete all four of these modes through various techniques and resources. Remember this is a forum for your agents to get a "B12" shot to continue growing their businesses.

Your Energy + Enthusiasm "before and during" the meeting sets the tone.

In order to accomplish as much as possible, this meeting has to be well prepared, organized, and managed. *A Team Leader's Guide to a Successful Sales Meeting* is your tool to ensure you conduct the type of meeting that keeps agents coming back for more—one that is fun, exciting, informative, and educational—and motivates them to achieve their highest business goals.

Some of the objectives of this meeting include:

1. Motivating agents through recognition, stories, Aha!'s, new techniques, and mind-sets around various challenges they are experiencing in the "real world."
2. Educating agents so they can establish top sales skills and techniques which will build their confidence, communication skills, lead-generation strategies, objection handling, and much more.
3. Inspiring agents to implement what they learn so they can be efficient and effective sales professionals in any given situation, and to overcome objections or other obstacles that may get in the way of achievement. You can also inspire agents through the sharing of others' achievements, or preparing and challenging them to accomplish goals that are above and beyond their norm.
4. Informing agents about upcoming Local, Regional, and International events.
5. Offering resources they can use to assist/support themselves in building their businesses and providing excellent customer service to their clients.

PREPARING FOR A SALES MEETING

"If you fail to plan, you plan to fail." — *Dr. Robert H. Schuller*

Preparing for a sales meeting is one key factor that will ensure victory for all. When you prepare for anything in life, you will have more time and energy to devote to the most important factor at hand—your agents and their needs.

Preparation for the meeting includes the following:

1. **Read *A Team Leader's Guide to a Successful Sales Meeting* one week prior to the actual meeting.**

2. **Post the meeting agenda one week in advance on a bulletin board and intranet site**. By preparing the attendees for the meeting, you can create enthusiasm, curiosity, and/or team spirit among agents with your agendas.

3. **Post all meetings on your yearly calendar, schedule, Day-Timer, etc**.

4. **Leave a voice mail for all your agents the day prior to the meeting as a reminder**.

5. **Confirm and test all involved equipment**. This is a crucial part to ensure the meeting runs effectively and efficiently. We recommend that you *complete the technology checklist the day before the meeting and again one hour prior*. If any issues arise, you will have time to adjust your original plans or call for technical support if needed. Technology checklist includes:

   Using the session DVD:

   ❏ Check audio setup such as speaker clarity, volume, and sound in general.

   ❏ Check visual equipment such as projectors, screens, and remote controls.

   ❏ Check all plugs, outlets, lighting, and any other electrical needs. Also, be sure any cords or cables are secure and out of the way.

   ❏ Review the session. Part of being an effective Team Leader is learning how to leverage your time. Since this is *a tool to assist you in educating your agents,* watch the scheduled session alone, just to become familiar with its contents and direction. Then let KWConnect do its job by playing it at the meeting. In other words, you don't need to teach the material, because the session is designed to do that for you.

   ❏ Review and print session material. Each session will come with a *Leader's Guide* to assist the Team Leader or Facilitator in conducting the sales meeting. The guide will include an Agenda Template, instructions for the Facilitator such as questions to ask, key points to discuss, comments on materials, and ideas to motivate agents.

6. **Room setup.** When setting up the room, either you, an assistant, or an assigned agent can do the following:

   ❏ Check to ensure that *each seat* in the room can see the screen or TV the session will be shown on.

   ❏ Check the lighting, temperature of the room for comfort and remember when all that energy starts to flow, the room will warm up.

   ❏ Ensure the seating arrangement is conducive to sharing ideas and learning, while also ensuring agents can see the Facilitator so they can focus and take notes.

   ❏ Have any handouts, materials, pitchers of ice water, and glasses in the room prior to the meeting along with pens or pencils to show you are prepared for the meeting.

   ❏ Have all props, handouts, and Facilitator's materials in the room prior to the meeting.

❑ Ensure you have reserved the room for at least a half hour prior to the meeting and at least fifteen minutes after the meeting so you have time to set up and break down.

7. **Self preparation**. Prepare yourself for the meeting by having a preparation ritual (fifteen minutes prior to the meeting) to get focused and energized. In addition, be sure to take a few minutes to review materials just prior to the meeting, which will also enhance your energy level and focus. Remember to avoid scheduling anything that would create a negative mind-set for you prior to the sales meeting.

8. **Prepare for the unexpected**. Always have a backup plan ready for every aspect of the meeting. For example, if the DVD does not play properly, be prepared to present material that you teach regularly, or have an agent "on call" to present just in case.

9. **Review the *Leader's Guide***. Review the Leader's Guide Training Session to refresh your memory and to motivate you!

SCHEDULING YOUR SALES MEETINGS

When scheduling an ongoing sales meeting, it is important to ensure the meeting takes place at the same time on a weekly basis. If there is a regularly scheduled time and place, agents become accustomed to it. It sets the pace for their weekly agenda. When interviewing a new agent, have them get out their calendar, Day-Timer, or Palm Pilot and insert the schedule for all sales meetings for the entire year. In addition, resources such as a room, equipment, and staffing are easier to manage. For example, Market Center staff will remember that an ongoing sales meeting is scheduled every Wednesday in Conference Room 3 at 11:30 a.m. (Remember, Gary Keller says in *The Millionaire Real Estate Agent,* "Lead Generation should be from 9:00–11:00 a.m. every Monday through Friday.") We suggest you don't interfere with Lead Generation.

Suggestions for scheduling ongoing sales meetings include:

1. Choose a day that will work well with the agents in your Market Center.

2. Choose a day that will inspire and motivate agents to attend so they can gain the benefits of the sales meeting and use the information, motivation, and inspiration from it to achieve their weekly or monthly goals.

3. Schedule the meeting for only an hour. Ensure you start and end it on time. Do not go over an hour so that you show respect for the attendees' time and schedule.

4. Send out a recurring meeting request via Outlook—with an auto-reminder or e-mail a week in advance—so agents can plan accordingly.

5. Recommended frequency of sales meetings is once a week.

6. Send an agenda one week prior to the meeting and/or attach it to the request in Outlook, and insert a motivational saying or topic in the subject line that relates to the objective of the meeting in some way. This type of

communication is about informing agents of the content and drawing their attention to the benefits available for them at the meeting. For example, you could incorporate in the e-mail something like:

Handling Objections: Commissions – If you want to keep your commissions high and win when competing against discounters, be at the sales meeting on <insert date> at <insert time> to see how top agents handle commission objections.

MANAGING YOUR SALES MEETINGS

Another element of a successful sales meeting is managing the time during the meeting. This means watching things like the time devoted for each section of the meeting, or discouraging attendees from taking too much time to share an Aha! or story.

Suggestions for managing a sales meeting include:

1. Set expectations. You can set expectations for the meeting—such as time constraints—by quickly reviewing the agenda and calling attention to the time allotted for each section of it.

2. Explain your role as the Facilitator. In addition, explain that your role as the Facilitator is to ensure everyone gets a chance to speak or the agenda is completed. One way to ensure the time constraints are met is to let attendees know that you or an attending agent will be the "time keeper." Explain you are doing this so everyone has a chance to speak thus time limits have to be enforced. By establishing your role up front, you can avoid agents becoming disgruntled if you have to interrupt them.

3. Stick to the agenda. By following an agenda, your sales meeting will appear to be well planned, prepared, and thus successful. Be a stickler about the agenda; also, ensure you get all the items covered to create security in your agent's mind that you are there to complete a task for their benefit. Send out a recurring meeting request via Outlook with an auto-reminder or just e-mail three to five days in advance so agents can plan accordingly.

4. Set up meeting rules and display them at each meeting. For example, you may have the agents come up with a few rules that will create the type of atmosphere they want during their sales meetings. Some rules can be:

   - Only one person is to talk at a time.

   - Avoid cross-talking or side-talking.

   - Be on time. Some Market Centers have a drawing for a prize, paid for by the sponsor. Only agents arriving on time are eligible to win.

   - You may have consequences for being late and for cell phones ringing or not, the choice is yours. We recommend a $5 donation to KW Cares.

ELEMENTS OF A SALES MEETING

Seven elements of a successful sales meeting:

As we discussed in the previous section, each sales meeting has a potential to motivate, educate, inspire, and inform agents to achieve their goals and create a win/win for all attendees. To be certain you accomplish the above in your sales meeting, we recommend seven elements are incorporated into your agenda:

1. Opening
2. Sponsor Moment (if applicable)
3. Culture Moment
4. Awards (first meeting of the month)
5. Listing and Buyer Promotion
6. Education and Learning Opportunities
7. Closing

Only one hour for this sales meeting? How can you possibly get all this accomplished? One way is to place time constraints on each element of your agenda. This way, any Facilitator who manages the time, manages the meeting, and all seven elements can be covered. (See agenda in the back of this guide.)

Not only do these elements set up expectations prior to the meeting, they also create a form of security in the minds of the attendees, because they will know what to expect at each meeting.

Since we know that everything in life is a process, one solid rule for training adult learners is to tell them what you are going to tell them, tell them, and then tell them what you told them.

OPENING

When opening a sales meeting, the objective is to:

- Energize.
- Entice attendees' curiosity or attention.
- Set a pace.
- Set expectations.
- Create a supportive atmosphere of fun and enthusiasm towards a team spirit.

Be creative when determining what will get your agents on a positive note when opening the meeting, and increase the energy level in the room. Since Gary Keller says everyone should lead generate from 9 a.m. – 11 a.m., we recommend you start a sales meeting at 8 a.m. or at 11:30 a.m. after the agents' lead-generation period is over.

Openings for the meeting include: (choose one)

1. **Upbeat music, dancing, or bells**. When your attendees walk into the meeting room, you want them to be happy they are there and excited to be part of the Market Center. One way to create such an atmosphere is to play loud, uplifting music from a CD or iPod. Another way to create a mood of enthusiasm is to clap to the music and encourage other attendees to do the same. The idea is to set the energy level in the room to "High." One Team Leader that we talked to said she opens her sales meeting by ringing a

bell and calling everyone's attention. (see DVD)

2. **Positive affirmations stated loudly.** For instance, state a positive affirmation with enthusiasm and conviction such as "I list and sell every day!" or "I am a great salesperson!" Then direct one side of the room to say it back loudly and with conviction followed by the other side of the room. Create some competition between the two sides as to who can say it the loudest and with the most enthusiasm.

3. **Video, pictures, or slide show.** More than 80 percent of the population is visual, so your room must be exciting.

4. **Have an agenda**. For your sales meeting, having an agenda is like having a map for all to follow. Make the agenda fun and exciting.

5. DVD **Example**: Refer to your video for an example.

SPONSOR MOMENT

Sponsor moments for sales meetings give those businesses that support our agents five minutes to promote themselves and their services. As the Team Leader or Facilitator of the sales meeting, your job regarding this segment is to hold the sponsor accountable to the allotted time. Remember, this is not a seminar and if agents have questions, prompt them to ask after the meeting.

Some Market Centers do not have sponsors nor do they allow businesses to take time in their sales meetings, the choice is yours.

Suggestions for the sponsor moment: (choose one)

1. On your agenda, list the sponsor's name, services they provide, and contact information.

2. Scripts for introducing a sponsor can include using their bio or simply stating their name, company name, and how agents can benefit from doing business with them.

3. Manage sponsors during sales meetings by ensuring they understand they only get five minutes, which includes their introductions. Remember, they are being given the opportunity to sell their services, not conduct a seminar.

4. Enlist sponsors to enhance their time in the spotlight by bringing lunch, snacks, handouts, or they could create an ice-cream social for after the meeting. They may also pay for awards to be given.

5. DVD **Example**: Refer to your video for an example.

CULTURE MOMENT

The culture moment of your sales meeting is to promote the set of values we call the WI4C2TS. These values are a set of beliefs and principles that we hold ourselves and others accountable to. These values were developed in 1986 and are believed to be the foundation of what makes Keller Williams such an exceptional organization to be in business with.

Suggestions for the culture moment include: (choose one)

1. **Develop inspiration**. Use a story, quote, or passage to heighten awareness.
2. **Share a culture story.** In advance, ask an Associate to share a story.
3. **WI4C2TS Associate of the month**. Create ballots prior to the meeting and distribute to agents so they can vote for the Associate of the month for the next scheduled meeting (see next page). Once collected, count the ballots and the agent with the most wins. You can ensure those agents who did not win this award receive their ballots by placing them in their file or mailbox, so they know they have been recognized.
4. **Show KWConnect Culture Power Perspectives**.
   – Show a session of a Power Perspectives.
5. **Giveaways**. Pass out something that is related to Keller Williams culture.
6. **Read from an inspiring book**. The *17 Essential Qualities of a Team Player* or the *17 Indispensable Laws of Team Work*, both by John Maxwell.
7. **Fill a bucket.** Recognize team players who have gone above and beyond the call of duty. An idea on how to let others fill buckets: recognize the first individual and then let that person recognize another. This can continue to go on for four to ten people, depending on the time.
8. DVD **Example**: Refer to your video for an example.

Nomination Ballot
Date:..
Associate being nominated:................................
Reason:..

(Example ballot for a culture moment—Fill a bucket or WI4C2TS Associate of the Month.)

Count all ballots and the agent with the most nominations wins. Be sure to recognize the winner in your sales meeting.

After the sales meeting, be sure to place each nominated agent's ballot in their file so that the agent can know that they were recognized even if they didn't win the contest.

MONTHLY PRODUCTION AWARDS

The monthly production awards should be no more than ten minutes. This part of the sales meeting is to recognize those agents who have met or exceeded average levels of production. For example, an award can go to the top listing agents—first, second, and third place. Other options can be top written awards, closed awards, top listing team, agent who gives you the most names to recruit, etc.

Categorize the awards–listings, Cappers, etc. Have the winning agents for the first category come to the front of the room to be recognized, and give a paper award or a star on the wall. To save time, be sure to call one after the other (not letting time lapse in between each winner). For example, *"Our first category is listing awards. Our winner for third place* *this month is Joe Cool, our second place is Rachael Smith, and our first-place winner is Marcie Lynne. Let's recognize these great agents for an outstanding job."*

Be sure to recognize teams and groups as well as individuals.

Suggestions for monthly awards can include:

1. Most Number of Listings Taken
2. Capper Awards
3. Most Number of Sales Made
4. Most Number of Closings
5. Top Volume Listings
6. Top Volume Sales
7. Top Volume Closed
8. Agent Giving You The Most Names for Recruiting
9. DVD **Example**: Refer to your video for an example.

LISTING AND BUYER PROMOTION

As the MREA research revealed, your circle of influence is a very powerful marketing source. Promoting listings and buyers to the other agents in the Market Center during a sales meeting allows agents the opportunity to increase their chances of selling a home or finding a home for a buyer.

To complete this element of the meeting, give agents an index card so they can share the pertinent information with their peers. In addition, give each thirty seconds (using a stopwatch or the second hand of your watch) to do an elevator speech about their listings or buyers.

Suggestions for listing and buyer promotion: (choose one)

1. Index-card method – To keep agents focused for a thirty-second promotion, have an index-card template (see examples on following page) and use colors such as blue cards for buyers and green cards for sellers. Then allow a thirty-second promotion about the property or buyer from agents wanting to utilize this resource.
2. To create more energy, have agents line up on one side of the room and take turns reading their index cards quickly, moving down the line. You can have the listing line of agents go first, then the buyer line. To ensure these promotions get full exposure, create a bulletin board in a centrally located area so agents can pin up their index cards. Only agents that attend the meetings can display their cards.
3. PowerPoint slide show – Another possible promotion can be to combine all listings into one slide show.
4. DVD **Example**: Refer to your video for an example.

Listing

Address: ....

Price/Area: ....

Bed/Bath: ....

Garage: ....

Features: ....

(Example of a listing promo card.)

Buyer

Area: ....

Price Range: ....

Bed/Bath: ....

Garage: ....

Features: ....

(Example of a buyer promo card.)

EDUCATION/LEARNING OPPORTUNITIES

Educating and creating a learning environment will be the most important piece of your sales meeting. This is your opportunity to take your agents from "E" to "P." Using KWConnect, you will find top-producing agents sharing skills and mind-sets to take all agents to the next level. To enhance learning, you can ask, *"Who in this room feels they are as skilled as these KW agents with handling objections?"* Or, *"Any of you have a challenge with commissions? How many of you will watch this and write down the objection-handling scripts? Great, let's plan on _____ at ___ time and all of us will practice and role-play together."*

Accelerated learning takes place through repetition. Set up a system that promotes role-playing among agents and allows them to find a role-play partner to practice the scripts everyday at the same time.

As it states in *The Millionaire Real Estate Agent,*

"Success leaves clues. Actions are the source of all results. Modeling is the pathway to excellence. Model these top-producing agents, don't just watch them. Building from the successes of others is one of the fundamentals of most learning. Models build the foundation and once you find success with the models then you can get creative."

Suggestions for education/learning opportunities: (choose one)

1. KWConnect – Use this tool often for education/learning opportunities. For example, you can access sessions such as:

   - Handling Objections

   - Agents in Action

   - Ten Steps to Effective Marketing

2. Panels and discussions

3. Legal updates – One way to spice this up is to play "here comes the judge." You can do this by having one agent be the defendant and another the plaintiff. Then act out a questionable scenario of a contract that took place in your Market Center. Through a raise of hands, have agents vote for the defendant or the plaintiff as winning the case. Then give them the true outcome of the update and tell them why.

4. Book resource list

5. Technology resources

6. End with Aha!'s

7. DVD **Example**: Refer to your video for an example.

CLOSING

When closing a sales meeting, remember to use the three "Es" which stand for encouragement, enthusiasm, and enlightenment. This is your last chance to encourage agents to get out there and implement what they have learned so their business will grow. Be enthusiastic and ensure all attendees are clear on resources or new techniques practiced during the meeting.

In addition, remember, listings are the name of the game for market share! So remind your agents at the closing of the sales meeting to go out and list.

Always announce in your closings:

1. Upcoming events from KWRI, Region, and/or Market Center

   a. Team-building events

      Example: Race for the Cure – have all agents walk/run with KW shirts and signs

   b. MREA book clubs
   – Announce next meeting/discussion dates

Suggestions for closings include: (choose one)

1. Confirmation of receipt of ALC minutes.

2. Uplifting and motivational quotes, songs, videos, or slide shows.

3. Positive, uplifting affirmations.

4. Updates on current and upcoming contests.

   a. 5-5-5 – Have agents compete to achieve 5 listings, 5 sales, and 5 closings in November and December. This will help them get ramped up for the next year. Everyone achieving this goal receives a prize.

b. Auction – Have your sponsors donate gifts and auction them off. Be sure to get gifts that will excite the agents and have them displayed during meetings. During the contest, agents can earn play money to use at the auction.

$100 = Listing taken

$100 = Sale made or Listing sold

$50 = For each closing

$50 = For each name they give to you to recruit

$10 = For every green sheet that is turned in correctly

$10 = For every training session attended

We suggest they receive their money at the sales meeting. Have it in envelopes with the amount written on the outside of the envelope for recognition purposes. Pass them out during the awards portion of your sales meeting on the weeks you do not have award presentations.

5. DVD **Example**: Refer to your video for an example.

ADDITIONAL SUPPORT/RESOURCES

For additional support or resources for your sales meeting, review the following list and create a list of your own. Remember, you are the connection and spokesperson between KWRI and your agents, so be certain to share as many KWRI resources and knowledge as possible.

Suggestions for additional meeting resources include:

1. MAPS – Mastermind program
2. MAPS – Coaching
3. www.KW.com
4. Book – *The Millionaire Real Estate Agent*
5. Book – *The Millionaire Real Estate Investor*
6. File folder – Create file folders inserting culture stories, quotes, and ideas as you think of them
7. Web sites – Access John Maxwell's Web site at www.maximumimpact.com
8. Quotes, mission statement, www.quotationspage.com, etc.

SALES MEETING AGENDA TEMPLATE

Sales Meeting Time Schedule

Date:

Time:

Location

TOPIC	MINUTES ALLOTTED
Opening	2-5
Sponsor Moment	2-5
Culture Moment	2-5
Awards	5-10
Listing/Buyer Promotions	5-10
Education/Learning Opportunity	20-25
Closing	5-10

EXAMPLE: SALES MEETING AGENDA

Sales Meeting Schedule

Date: June 28, 2006

Time: 11:30–12:30

Location: Conference Room 3

Topics: How to Obtain More Listings by Handling Objections

Opening: I Can't Hear You! .... 5 Minutes
- Market Center Cheer

Sponsor Moment: Land Title .... 5 Minutes
- Let Dave help you with all your escrow needs.

Culture Moment: Fill a Bucket! .... 5 Minutes
- Cast your vote for our WI4C2TS Agent Award.

Production Awards: Top Listing, Sales, and Closing Agents .... 5 Minutes
- Recognize our top-producing agents for Listings, Sales, and Closings.

Listing/Buyer Promotions: Advertise to KW agents........ 10 Minutes
- Increase your chances of selling a home or finding a home for your buyer.

Education/Learning Opportunity: .... 25 Minutes

KW Connect: Handling Objections
- Top-producing agents share their scripts and strategies to handle objections and get more listings.

Closing: Upcoming events .... 5 Minutes
- Race for the Cure: June 18
- Mega Agent Camp: September 26

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