

Sales Meeting Agenda

1. Meeting Information

Date	{{Date}}
Time	{{Start – End time}}
Location	{{Location or video link}}
Facilitator	{{Facilitator}}
Note-taker	{{Note-taker}}
Attendees	{{Attendees / required vs optional}}

Fill this block before you send the invite so everyone knows when, where, and who is expected. Name a facilitator and a note-taker — meetings without both tend to drift.

2. Objectives

- Get a clear read on the pipeline and the forecast against {{quota}}
- Unblock the deals that need help to move this {{week / month}}
- Share what's working and reinforce one coaching or product point

State one to three outcomes this meeting must produce — a decision, a plan, an aligned team. If you cannot name an objective, the meeting can probably be an email.

3. Agenda

Topic	Lead	Time	Type
Wins & closed deals since last meeting	All	5 min	Inform
Numbers bookings vs target, pipeline coverage	{{Sales manager}}	8 min	Inform

Pipeline review: top deals by rep & next steps	Each rep	15 min	Discuss
Deals that need help / blockers	All	10 min	Discuss
Forecast, commit, best case, and risks	Sales manager	7 min	Decide
Coaching / product / competitive update	Owner	5 min	Inform
Action items & priorities for the week	Sales manager	5 min	Decide

Give every item an owner, a time box, and a type — Inform, Discuss, or Decide — so people come prepared and you protect time for the decisions that matter. Put the most important item first, not last.

4. Decisions & Notes

Topic	Decision / key note	Follow-up
Deal or topic	What was decided — e.g. discount approval, strategy	Follow-up

Capture decisions as they happen, in the room. A one-line record of what was decided prevents the same debate from reopening next week.

5. Action Items

Action	Owner	Due date
{{Next step on a specific deal}}	{{Rep}}	{{Due date}}
{{Action}}	{{Owner}}	{{Due date}}

Every action needs a single owner and a date — “we” is not an owner. Read these back aloud before you close the meeting so nobody leaves surprised.

6. Parking Lot

- {{Process or comp question to handle separately}}

Park anything important that is off-agenda here instead of letting it derail the meeting. Review the parking lot when you plan the next agenda.

7. Next Meeting

Date & time	{{Date and time}}
Focus	{{Main focus for next time}}

Set the next meeting before everyone leaves — it is far harder to schedule afterward. Note the main focus so the next agenda almost writes itself.