

## CFAS5.2

### Prepare and run sales meetings



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#### Overview

This unit is about organising and running sales meetings. Meetings are a central component of the sales process. They sometimes involve only members of the sales team and sometimes involve you and your customers.

In either situation you must plan the meeting and decide what you want to achieve in it. You must then take part in the meeting in a way that enables you to achieve your objectives. You need to facilitate the meeting in a way that keeps it running smoothly and discourages unhelpful diversions and disagreements.

This unit is for; Sales Team Leaders

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#### Performance criteria

- You must be able to:*
- P1 determine the exact purpose of the meeting and the outcomes you are seeking
  - P2 establish the time and place of the meeting and arrange appropriate facilities
  - P3 identify the participants in the meeting, invite them in good time and discuss the meeting with individual participants to brief them on roles and objectives
  - P4 prepare an agenda for the meeting outlining the key areas to for discussion and organise the production and distribution of appropriate advance
  - P5 appoint a minute taker for the meeting in order to ensure that all discussions, outcomes and actions are accurately recorded
  - P6 explain the objectives and purpose of the meeting and the desired outcomes then manage the timing of the meeting effectively, ensuring that all agenda points are discussed
  - P7 encourage participation in the meeting by starting the meeting off with an appropriate greeting and through the use of a variety of questioning techniques
  - P8 ensure that the minutes have been recorded effectively by summarising the issues discussed at appropriate points in the meeting
  - P9 communicate decisions, recommendations and proposed actions to all participants and ensure that the actions are followed up
  - P10 evaluate the effectiveness of the meeting and whether or not the objectives were achieved in order to develop your skills for future meetings

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### Knowledge and understanding

*You need to know and understand:*

- K1 the different types of sales meetings that can take place
- K2 how to plan for and prepare meetings
- K3 how to prepare an agenda for a meeting
- K4 the role of a chair and facilitator in a meeting
- K5 typical resources required for meetings
- K6 how to read verbal and non-verbal signals in meetings
- K7 how to show those in the meeting that you are listening to their points of view
- K8 how to manage difficult people in meetings
- K9 how to take minutes in a meeting that record key points and identify proposed actions
- K10 the importance of following up actions from the meeting
- K11 legal, ethical and social requirements relating to running meeting
- K12 health and safety legislation directly impacting upon the running of meetings

### **Industry/Sector Specific knowledge and understanding**

- K13 sector practices and conventions for the conduct of meeting

### **Context specific knowledge and understanding**

- K14 organisational protocol for running meetings
- K15 available venues for meetings
- K16 who to invite to a meeting and how that will benefit the outcome of the meeting
- K17 resources that are available for a meeting
- K18 how much time is required for the meeting
- K19 templates or formats used for recording of minutes and proposed actions

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#### Additional Information

##### Behaviours

1. you discourage unhelpful diversions and disagreements
2. you respect differences between people and work with them
3. you recognise individual expertise and talent within the group
4. you give credit where it is due to those involved in the meeting
5. you accept the challenge of others and respond positively
6. you handle difficult situations with professionalism
7. you use questions to encourage greater participation in the meeting
8. you manage time effectively
9. you read verbal and non-verbal communication signals as a way of assessing the progress of the meeting
10. you ensure that minutes are accurate and actions clearly determined
11. you follow up proposed actions and encourage others to follow up actions allocated to them

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**Relevant occupations**  
1132 Marketing and sales managers  
3542 Sales representatives  
7113 Telephone salespersons  
7129 Sales related occupations nec

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**Suite** Sales 2010

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