

MANAGER MEETING AUDIT

SALES MEETING EFFECTIVENESS CHECKLIST

THE LEADERSHIP TEST

A sales meeting should change what reps do after they leave the room. If it only reports numbers, it may not be developing performance.

WHAT THIS TOOL HELPS YOU DO

01

Audit the meeting itself

Check whether the agenda moves beyond updates into diagnosis and coaching.

02

Make practice unavoidable

Build a short rehearsal of one real selling skill into the meeting.

03

Leave with ownership

End with measurable actions that get revisited at the next meeting.

THE 6-POINT MEETING AUDIT

For each item, mark YES or NO during your next sales meeting. Count your YES answers at the end.

01 CLEAR OUTCOME

Can everyone state what should improve as a result of this meeting? YES / NO

02 USEFUL METRIC

Did we examine a meaningful conversion or execution measure? YES / NO

03 ROOT CAUSE

Did we diagnose why a problem is occurring instead of only naming it? YES / NO

04 REAL EXAMPLE

Did we review a real call, deal, objection, or follow-up situation? YES / NO

05 SKILL PRACTICE

Did reps rehearse or demonstrate a better approach? YES / NO

06 ACTION + OWNER

Did we leave with specific actions, owners, and review dates? YES / NO

REBUILD YOUR NEXT 30-MINUTE MEETING

Interpret your score: 0-2 YES = reporting-heavy; 3-4 YES = mixed effectiveness; 5-6 YES = execution-focused. This is a practical self-check, not an industry benchmark.

00-05 MIN / THE SIGNAL

Show one meaningful metric and the behavior behind it. Avoid reading every number aloud.

05-15 MIN / THE DIAGNOSIS

Review one actual deal or call. Ask what happened, why, and what could change.

15-25 MIN / THE REHEARSAL

Role-play the weak moment. Let reps practice and receive specific feedback.

25-30 MIN / THE COMMITMENT

Each rep identifies one behavior to apply; manager sets the follow-up check.

WANT TO IDENTIFY YOUR TEAM'S BIGGEST PERFORMANCE GAP?

Book a complimentary 15-minute strategy session.

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