

Podcast Script – Every Meeting Needs an Agenda

Welcome to this sixty second Sugar snippet. My name is Susie Williams. Today we're going to talk about a best practice that applies to everyone, from sales reps to managers to anyone in business – the effective use of a meeting agenda.

Every customer meeting (and, in fact, *every* meeting) should have an agenda. You should tell everyone what the purpose of the meeting is, what topics will be covered, and what outcomes you expect from the result of the meeting. Furthermore, you should get agreement from all attendees that this is indeed the complete list of topics to cover.

Just to get your mind thinking in this direction, here are some examples of meeting agendas:

- (For a discovery session or product demo) Today we are going to talk about your current sales environment, including what issues you're facing with your current CRM solution. Then we will give a quick demonstration about how SugarCRM can help solve your business issues. At the end of this meeting, we hope you will have learned how we can provide a great solution for your needs, and, in turn, we hope to have gained an understanding of your business.
- (For a pricing discussion) The objective of today's meeting is to propose our pricing model. We will discuss contract terms, payment options, and next steps so we are all clear on how to proceed.

A best practice is to have your first slide spell out the agenda in clear terms, and then return to the slide at the end of the meeting to review and ensure all items have been covered. The agenda becomes a reminder to all of what was covered and it shows that you are organized, professional, and respectful of your client's time.

And that's your sixty second Sugar snippet. Goodbye!