

## Planning Meetings

A Planning meeting is different from a staff monthly meeting. Planning meetings are normally held if the company is looking at some big changes OR preparing for the next year (evaluating current successes and failures and planning next year goals and successes)

Below is a suggested way to start and hold a powerful planning meeting.

- Acknowledgement
  - Open with gifts, prizes, acknowledgement, etc. Starting with high and positive energy is a great way of having everyone leave the (hate meeting mentality”) and see this a positive experience
- Share the successes of last year. Share the numbers.
  - Note: Each team member should have copies of year-end sales numbers, profit and loss statements, etc. Everyone should be on the same page!
- Go around the room and have everyone share their ideas for growth! (This is a time that any and ALL thoughts and Ideas are accepted, we are not trying to lay out the details just have people brainstorming) What they came up with for areas of opportunity for next year!
  - Be sure to allow each person to express their ideas without challenging or saying whether you feel it will work, this is simply an opportunity to allow each person to express him or herself and to contribute.
  - Write the ideas on a white board so that when everyone can see them and they are acknowledged (you will use this board to prioritize later in the meeting)
- Once everyone has shared ideas, then as a team choose 3 areas of opportunity that you all feel should be the focus for the year.
  - To help the team prioritize the top three, number each idea and have everyone vote for his or her top three. Mark each idea with a check mark as a team member votes for it. Once voting is complete you will then select the top 3 with the most votes. If there is a tie, it will be a great time to talk about what idea will move the company and staff (this will be a positive and great business conversation for staff to be involved in)
  - These now become the 3 areas of focus for the year. (This does not mean that we won't tackle some of the other ideas next year, these just happen to be the top 3 for right now!)
- Once all three have been selected then as a team come up with what needs to happen in order for these opportunities to happen: You will need to think of: team leaders, money, goals, incentives, systems, education, software, training, employees, temps, etc. Be specific and measurable.
- Set your sales goals for each department by quarter for next year. Assign leaders and schedule your monthly follow up meetings! Be sure that everyone is assigned duties and by when dates to follow up!
- Complete! Congratulate

You can change alter anything on this agenda, it's only point is to support you and your team to have a roadmap to having a successful company planning meeting

Good Luck