Monthly Pipeline and Activity Meeting

About: The Sales and Marketing Pipeline and Activity Meeting is a 1x monthly meeting where partners and future partners meet in a roundtable format to discuss successes and failures in a non-threatening and nurturing environment. A further criterion for attendance is “anyone primarily responsible for growth of the firm or anyone with a revenue goal of $10K or more per year.” The meeting is 100% positive and is primarily used to report on activity, track sales, and support partner level marketing and business development activities. The topics discussed include a review of new business (new clients and cross-selling), sales and marketing activity by person over the past 30 days, discussion of key upcoming marketing activities (such as a large networking function between our firm and a law firm) or a major firmwide marketing initiative such as the launch of a new seminar series. This is a discussion and reporting group. The only way it works is if there is significant participation and interaction. Each attendee should prepare their Sales and Marketing Pipeline and Activity Report PRIOR to the meeting and be prepared to discuss its contents. See a sample marketing activity report attached.

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A typical agenda looks like this:

I. (20-30 mins) Share activity, facilitator capitalizes on opportunities to educate, recognize successes, and remind people of things they should be doing. Activity report sections include:
   A. Key Client Meetings
   B. New Clients (Estimated $ is put on the white board and totaled at the end of the meeting)
   C. Cross-Selling Discussions (Estimated $ is put on the white board and totaled at the end of the meeting)
   D. Proposals/Engagement Letters
   E. Referral Source Meetings
   F. Referrals In/Out
   G. Networking Events
   H. Other Marketing
   I. Action Items for Next Month
II. (2-4 mins.) Facilitator discusses key marketing topics of the day such as sales pipeline updates, an upcoming major networking function, major marketing initiative progress (such as a new brochure)
III. (1 min) Reminder of next meeting date and key takeaways from the day
The facilitator should ask for a volunteer to start and then discussion continues around the room. The facilitator should be prepared to ask questions about activities that will promote learning and self-reflection when:

- There appears to be a next step – Activity was reported as “I attended a networking function at XYZ chamber” The facilitator should ask “Who did you meet, who are you going to follow-up with, and when?”
- An opportunity was missed – Activity was reported as I was at a large client all week” The facilitator should ask “Did you take anyone from the clients’ office out to lunch?” If not, why not?
- A significant win was encountered – Ask the person who reported it how it happened and who was involved.

Finally, as a means of tracking efforts, consider having everyone turn-in their sheets to the facilitator, who then takes a copy of each sheet and files it for future progress discussions. It can also be a good way to identify under-performers and having a one-to-one discussion with them.

**Frequency:** Hold 1x per month, as a standing appointment

**For More Information:** Contact Art Kuesel, President, Kuesel Consulting 312.208.8774 or art@kueselconsulting.com