

Cross Selling – Meeting Agenda

Welcome & Introduction (10 Minutes)

Review of the Solve One More process and guidelines (10 Minutes)

Identify Opportunities (20 Minutes)

- What services are provided in our market
- How to identify client's that could benefit from them
- What to say to a client
- How to submit an opportunity

Follow up on Opportunities: (5 Minutes)

- Expectations
- Use of salesforce.com

Action Plan (15 minutes)

- Identify target clients
- Commit to actions
- Plan for accountability