

Cross Selling – Follow Up Meeting Agenda

Welcome & Introduction

Review and Update Status of Current Action Plan

Open Discussion – Struggles and Obstacles

- What obstacles or objections were faced with identifying opportunities, chatting with clients, submitting the opportunities
- What obstacles or objections were faced with responding to opportunity, contacting person that submitted the opportunity, contacting the client
- What can be done to overcome obstacles or objections

Open Discussion – Successes

- Where did we experience success? Identifying clients? Additional Services? Good conversations with clients? Gaining agreement on opportunity? Sales working well with person that submitted lead? Etc.

Update Action Plan

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