

Suggested Meeting Outline & Expectations

W H I T M A N
& A s s o c i a t e s



With Connie Whitman, MBA

Suggested Meeting Outline & Expectations

Client Name:
Meeting Date:
Meeting Agenda

I. Information Gathering

- a. What are the behavior changes expected after this training/endeavor (end-result is seeking)?
- b. What training has been done to date?
- c. What has worked and what has not?
- d. Provide details of training topics currently in place for year.

II. Time Frame

- a. Provide information relating to corporate strategic plan expectations for the next one through five years.
- b. How does the training fit into this strategic plan?
- c. What are timeline expectations?

III. About The Company | Whitman & Associates, LLC

- a. Over 37 years experience in Financial Sales and Sales Management
- b. 19 years as CEO of Whitman & Associates, LLC
- c. Upcoming book launch April 2020 – ESP – Easy Sales Process: 7-Steps to Sales Success
- d. Philosophies on employee learning that is impactful and provides behavior changes
- e. How to get learning to stick, once employees are back at their office/in their territory?

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IV. Recommendations

- a. Basic discussion
- b. Proposal to follow, based on the information gathered during this meeting
- c. Investment needed for the program delivery, will be outlined in the proposal.

V. Next Step

- a. Follow-up and expectations after meeting

VI. Questions & Answers

Suggested Meeting Templates

Client Name:

Meeting Date:

V. Next Step

- a. Follow-up and expectations after meeting

VI. Questions & Answers