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Item	Start	End	Notes
1. Welcome	8:00	8:15	
2. Prayer	8:15	8:30	
3. Business Meeting	8:30	9:30	
4. Lunch	9:30	10:30	
5. Presentation	10:30	11:30	
6. Open House	11:30	12:30	
7. Registration	12:30	1:30	
8. Dinner	1:30	2:30	
9. Entertainment	2:30	3:30	
10. Closing	3:30	4:00	

### Sample Field Sales Training Agenda

Sales training is a continuous process. Once the initial classroom training is done, there needs to be ongoing discussions, constant feedback, and best practice sharing sessions between the salespeople to continuously improve. This Sample Sales Training Weekly Meeting Agenda Form is meant to reinforce the initial classroom training while incorporating some of the experiences in the field.

See more/Sell more, Mapping, Closing

#### INTRODUCTION:

**8:00 – 8:30**  
Have salespeople fill out/finish customer transaction forms.  
Cash reconciliation: collect money and paperwork.

#### RECOGNITION:

**8:30 – 8:35 (5 min)**  
Recognize the sales representatives that had the most:

1. Hours worked
2. Number of households visited
3. Number of products/services sold
4. Total dollars sold

Note: Clap for the winner of each category!

#### SUMMARY OF LAST WEEK:

**8:35 – 8:40 (5 min)**  
Ask sales representatives to summarize what they learned last week.

#### OVERVIEW OF TODAY'S LESSON:

**8:40 – 8:45 (5 min)**  
4 things today:

1. See More/Sell More (see more prospects, sell more products)
2. Mapping
3. Trial Closing
4. Inspiration: Act out family situation with sales representatives and customers

#### See More/Sell More

**8:45 – 9:00 (15 min)**  
Example: Two sales representatives train:  
- Sales representative #1 sees 10 people, and only sells 3 products.  
- Sales representative #2 sees 20 people, and sells 6 products.

Why the difference in performance? Because they are "talent" – same appearance, experience, skills, and knowledge – the only difference is that sales representative #2 saw more people than #1.

## CLASSIC MEETING AGENDA TEMPLATE

DATE 00/00/0000	LOCATION _____
TIME 11:30 AM	TITLE _____

### AGENDA DETAILS

#### I. Agenda Item 1 description

- a. Remarks
- b. Remarks
- c. Remarks

#### II. Agenda Item 2 description

- a. Remarks
- b. Remarks

#### III. Agenda Item 3 description

- a. Remarks
- b. Remarks
- c. Remarks

#### IV. Agenda Item 4 description

- a. Remarks
- b. Remarks
  - I. Remarks
  - II. Remarks
  - III. Remarks
  - IV. Remarks

#### V. Agenda Item 5 description

- a. Remarks
- b. Remarks
- c. Remarks

#### VI. Agenda Item 4 description

- a. Remarks
  - I. Remarks
  - II. Remarks
  - III. Remarks

### Fundraising Committee Meeting 2016

#### Agenda

(Organization's name)

(Date and time of meeting)

(Location of meeting)

Chaired by: (insert name)

Attendees: (insert names of those attending)

Apologies: (insert names)

#### 1. Review of our fundraising to-date:

- How much have we raised in 2016?
- How much did we raise in 2015?
- What has worked well?
- What hasn't worked well?

#### 2. Plan what we want to achieve:

- What do we want to achieve as an organization during 2017?
- What are our goals for 2017-2018?
- What evidence do we have to demonstrate the need for our proposed activities and services in 2017?
- What resources are needed to carry out our plans for 2017?
- What is the estimated total cost to deliver our proposed plan for 2017?
- What resources do we already have?
- What items can be donated?
- How much funding have we already raised for 2017?
- How much funding do we still need to secure for 2017?

#### 3. Plan how we will make this happen:

- Who have we got on board?
- Do we need any extra help?
- Should we create a fundraising subcommittee? Discuss the roles and responsibilities.
- How will we raise the funds?
- Discuss key fundraising goals and set dates to achieve them by

#### 4. Fundraising processes:

- How are we managing data?
- Are we following best practice?

## SAMPLE OFFICER TRANSITION RETREAT AGENDA

Adapt this outline to best suit the needs of your organization.

### OUTGOING AND INCOMING OFFICERS PRESENT

I. Icebreaker / teambuilding activity.

II. Overview of the agenda and group discussion of the goals of the workshop.

III. History of the club: From past to present.

IV. Review short and long term goals, and progression toward them.

V. Review of financial status and accounting history of the club.

VI. External review: Overview of past year's programs, events and activities (Officer Evaluation activity suggested).

- Successes
- Areas for improvement
- Advice for the future

VII. Internal review: Overview of internal club affairs (Officer Evaluation activity suggested).

- Successes with membership participation/development
- Areas of difficulty/Areas for improvement
- Advice for the future

### OUTGOING OFFICERS LEAVE, INCOMING OFFICERS AND ADVISOR CONTINUE

VII. Discussion over the role of the advisor in the club (Role of the Advisor activity suggested). Set expectations for interactions with advisor.

VIII. Discuss goals of the club for the coming year. Be sure to review long term goals established by past administrations.

IX. Discuss ideas for internal club development.

X. Discuss ideas for external club programs (i.e. events and activities).

XI. Discuss budget for following year (pending SAF allocation, if applicable).

XII. Establish dates for follow through.

XIII. Discuss possible appointments of committee leadership and/or open positions.

#### Sample board retreat agenda.

There are also things that we don't think of that can make an experience even better. Sample Board Retreat Agenda7056 Downloads Banding your remote workers together and reinforcing a shared identity is tough without physical interaction. Because most of the things we do, we will tend to compare it to a "real-life" experience. Virtual retreats are a great way to keep remote employees engaged and active, while providing them with a platform and opportunities to connect with other individuals within the organization. It is a race against the clock to solve the mysteries and find the murderer! Boost team morale and maintain a sense of comradery among team members. Theme Ideas: To bring life into the event—you can create a theme like: having everyone wear the same color on a specific day or a dress code for the event. There are various themes available to match the theme of your retreat. 5. A Checklist for Conducting a Virtual Retreat: Establish the goal of your online team-building activity. 13. You can then organize the activities by which days they are going to be held. Woyago's virtual trip to Paris Laugh, learn and connect with your team while in Paris from the comfort of your home. Virtual retreats consist of company gatherings that take place on online platforms such as Zoom, Slack, Webex, etc. Scattergories This game promotes creative and quick thinking among the participants. Employee Wellness Sessions These activities can include mindfulness and meditation sessions guided by an expert, performing a joint home workout session, desk stretching for posture, yoga, building new habits, etc. Use this opportunity to create a fun time, by recognizing members for their outstanding contributions. Virtual Scavenger Hunts Ensure that the rules for this scavenger hunt are simple and that the items are common in households. Does the scale of the retreat extend to the entire company or only to specific teams? There will be a range of activities that relate to French culture such as trivia questions, vocabulary lessons, quirky stories, etc. Event management: It is vital to delegate roles to different individuals during the retreat. Activities should be conducive and promote a safe and fun environment for everyone. Keeping different time zones in mind: There are two ways you can tackle running an event with people located in different time zones. Below you will find the guide on all of the steps you must take in order. Have a music playlist ready beforehand and accept any song requests along the way. You can use a tool like The World Clock Meeting Planner or allow people to join the event at different times. When everyone is in a different environment like their house, it's especially hard to keep their attention and make sure that everything is organized during the virtual retreat. Ensure that the scope of the retreat can fulfill the goals and objectives planned for the virtual event. Now, let's get into the content. Conduct a sound check to ensure that everyone can hear the host's music and start dancing! 16. Offline book clubs Have your remote workers do some reading independently and set dates for virtual meeting and sharing sessions. It is important that everyone knows what is going on and it's important for everyone to be excited. In this article, NoHQ has compiled a list of virtual team retreat activities that you can start using for your next team bonding session! Before we dive in to go over the list of activities, we will talk about how to organize an event. There are extras that you can add on such as "picnic boxes" where everyone will be mailed a box filled with french delicacies! 15. Hoppier can also be used in this situation as well for prizes. This boosts engagement and adds life to the event. Things to keep in mind before organizing your virtual retreat. Take a break from the screen. With Atlassian's learning circle templates, designing a virtual educational activity becomes an easy feat. Make audio-only sessions an option to counter Zoom fatigue. It is important to choose the right software to host your virtual retreat. The virtual space is still new and running a virtual event can bring uncertainty. Just because it is no longer a physical retreat, does not mean that you should skip on the surprise! Instead, you can mail door gifts to your participants. This allows you to successfully execute a virtual retreat. Live Home brew experience How about giving your remote workers the chance to become brewers for a day? You should explore each software to see which one lines up with all of the features you are looking for to host your virtual event. Zoom: This is probably one of the most popular software around. Creating a framework is important to keep their attention, keep them engaged, and ensure success. Give participants peace of mind by acknowledging that background noise, or their kids interrupting them at times is at right. Duration and theme of the retreat? Closing — Leave some time for participants to thank the organizers and hosts before thanking the participants and saying goodbye. As such, we hope that this article has given you some useful suggestions on virtual experiences for your retreat, and we can't wait to hear some of your success stories! To combat confusion, boredom, and to have a successful event. Hackathons Hackathons are usually software focused, but can be tweaked into a brainstorming session. Learning Circle by Atlassian How about an opportunity to learn something new as a group? When it comes to organizing virtual events—the problem is not coming up with ideas. Virtual Trivia Successful trivias have the most interesting questions. You can go around in a circle and everyone will come up with a NEW idea. Organizing a great experience for your team or company that breaks away from the mundane daily tasks is vital for virtual work culture. With so many great virtual retreat ideas it is good to know how to organize all of them. Here is a list of how to do this: Coming up with goals: You can facilitate the process of "finding the purpose" by conducting a meeting with everyone attending the event. Virtual water cooler moments: In a normal physical event, you can have a moment when you walk out to get water and stop to talk with a friend or person. The "real" problem is organizing the virtual event. Throw in topics such as "new services we can offer" or "how to reduce spending on a certain topic" and you might be greeted with some unexpected suggestions. Virtual retreats are no longer static and can fulfill the same objectives as a physical retreat. Circles: This platform utilizes a circle layout and is good for smaller groups. A virtual retreat will allow everyone to break away from their daily routine. 4. Each software has different features. Of course, you'll need to share some video resources with them to get them started. Get everyone "pumped-up": Here is a great example of what LifeLabs Learning did "we set the mood by playing music and welcoming people as they trickled into the zoom room. They foster stronger interpersonal relationships and virtual communication skills, boost the morale of remote workers and promote team collaboration. It is easy to use and has features such as: polls, breakout rooms, screen sharing, and much more. What is the issue that you want to address through this activity? Send collaterals before the session: To combat screen sharing, simply email printable content to anyone attending the session so they can follow along. These sessions can help foster cross-team interaction and help teams understand how they can better support each other through shared knowledge. It has the power to elevate and promote a remote culture that everyone enjoys. There is, of course, no perfect formula or structure to a virtual retreat, but the essence lies in finding new ways to foster human connections in a virtual world. What is the budget? Workshop sessions Workshop sessions consist of learning events, in which a specialist talks about the ins and outs of what they do. How to organize your virtual retreat. Swag Bags In every retreat, employees are always looking forward to seeing what is in the prize pool. This experience lasts 2 hours, and can be carried out over Zoom. They will even ship the kits to your participants on your behalf, saving your team all the trouble. 11. Teams will go head-to-head in this virtual game show and tackle trivia challenges from a wide range of topics. These virtual water cooler moments are ideal to implement in a virtual retreat, as a way to break away from the screen. This activity is also great for promoting a shared understanding and team cohesiveness. 21. Remo: This platform is great for mealtime or a virtual retreat that has multiple events happening at once. Assigning a budget: Sure, a virtual budget might look a lot lower than a physical event's budget. How many employees will be attending? Once you know your budget it's good practice to try to maximize it as best as possible. Share guidelines & checklist: Share guidelines at the beginning of the retreat, for everyone to be on the same page and to know what is happening. This game can be used as a virtual icebreaker to hype everyone up with some friendly competition. 14. Before planning a virtual team retreat, there are things that we are not aware of that can make a bad experience. Planning the perfect retreat. All of these items can be utilized to make the virtual retreat even better. Throw in memorable questions that encourage participants to share with their friends and family. Sometimes that break can take you out. To facilitate the planning process, we have come up with a foolproof way of planning the event. Since we had a daily dress code, we invited people to dance and show off their outfits. To combat isolation and boredom we have come up with a guide on how you can better utilize these virtual water cooler moments. That's why it's important to take a break from time to time during the retreat. For example, a product manager could host a session on what the next product release features will be to marketers and salespeople who are not in the trenches of product development. We have a section below that goes over a rough guideline. What is the desired outcome you are aiming for? This is a great time to work on skills such as communication. DIY Craft Challenges You can set a time limit and allow participants to use whatever items they have at home to build something according to a theme. Because of this, some might need to lower their budget. Alternatively, you can schedule a follow-up session if more time is required. Welcoming everyone — Open the room early and greet people as they connect. It's also smart to break up the ideas into 2 categories: one for small breakout groups, and one for large groups. 2. It also keeps teammates engaged, by giving them a great interactive experience. Prioritize the list: Then cut the list down by using the process of elimination to only use the ideas that everyone agreed on. This could create that "unique" experience that you are looking for. Game Show Extravaganza This activity may last from 30 minutes to 2 hours depending on your preference. This is known as a water cooler moment. Share your space with your team: To humanize and personalize the experience you could invite loved ones and family members to participate in a session. We have created a guide with some tips and tricks on how to master your virtual communication. With this, you will be able to share with everyone from the beginning, so that everyone can have clear expectations of what they are going to be getting from the event. These can include workshop sessions, company updates, and fun initiatives that range from virtual tasting events to online games. Experimenting is important. Alternatively, if you have a budget, you can give teams some money to buy a specific list of items required for the session beforehand. 10. You can also recommend a list of titles to read if your team is unsure of where to begin. 22. They have various fun add-ons that you can select such as creating video trailers on your behalf and other extra activities. 8. Online Escape Games Teams will be required to work together to solve riddles, find clues and keys to escape the room within a fixed amount of time. After all, great virtual events can also help improve your remote work culture. 22 Virtual Retreat Activity Ideas 1. The aim is to get participants up and moving, with some competitive spirit. 7. Confetti Confetti is a one-stop-shop for online team building activities. Team Pursuit Remote teams are made to compete against each other in a series of virtual mental, physical, skill, and mystery challenges. Host virtual team-building activities: You can integrate this type of event into one of your daily activities. Create an award Ceremony: You can use the spot in the virtual retreat to also host an award night or award ceremony. There is also other software that you can look into such as Hangouts, BlueJeans, Kosmi & WebEX. Participants get to taste samples mailed to them with an expert guiding the entire experience, running for an hour or so. 6. Virtual Dance Party This may start off a little awkward, so it would be great if the host could step forward and be the first to get the ball rolling. Here is another great example of what LifeLabs Learning did: "We scheduled a 30-minute block for LabaPals to connect, debrief previous sessions, and go on a walk (we call them soul-strolls) together". No prior knowledge is required and all the equipment and ingredients will be delivered right to your participant's doorstep prior to the event. 20. Use tools like Watercooler Trivia to bring trivia fun to your workplace. The idea is to send all participants a Happy Hour Box filled with some snacks and drinks. Engage with the participants to keep them entertained through welcome questions, polls, etc. Then, we each grabbed a noisemaker to collectively "gong" in to kickstart Labapalooza". Having clarity at the beginning of what you want everyone to get out of the event is important. Some of their trending experiences include cookie decorating classes, museum storytelling tours, drag bingo, and much more. Your video conference platform is your venue. A moderator will be required to also act as the host and assign the scores. 12. Here is the framework: Brainstorm ideas: Have a meeting just come up with virtual offsite ideas, for everyone attending the event. Rough outline Agenda outline — Let the participants know what to expect and present them with a rough timeline for the virtual retreat. Alternatively, you can host the games yourself and create your own question pool. 17. Create personalized Gifts to use at the event: A service like Hoppier will allow you to create personalized "swag bags" with things such as buzzers, gift cards, whistles, costumes, and more. Virtual Icebreaker — Run a short "getting to know each other" session through 1-2 games and get the ball rolling and hype up the participants. Ideas like the ones you will find in this article. Perform test runs Overcommunicate the schedule to ensure everyone is up to date. The aim is to improve the health and wellness of your participants and to get them to relax. 9. 6 steps you can take to run a killer virtual retreat. However, with regularly scheduled virtual team bonding activities and retreats, you can counter work from home loneliness. The main objective of these games is to encourage collaboration and teamwork. 3. You can browse and instantly book online experiences through their platform. Of course, this will involve a little more work in finding out the dietary restrictions of your participants to cater to their needs. Some companies create sign-up sheets so that people can choose the role they want to take on. Make certain that all activities provide a level playing field. Request for your remote workers to jot down their thoughts and learning points and host discussions to facilitate knowledge sharing. Come up with an end goal and mission for your retreat. However, what we want to create is a unique experience. That is why trying new things is important, so you can get a sense of what works and what doesn't work.

