1st Sales and Marketing Setup Meeting Agenda Template

Purpose: Establish shared definitions, metrics, owners, and expectations so monthly results meetings are productive and aligned.

Time: 60–90 minutes
Facilitator: CEO or Fractional CMO
Attendees: CEO, Sales Leader, Marketing Leader, 1–2 key team members

Purpose: Establish the shared language, definitions, metrics, processes, and expectations that make monthly results meetings productive and aligned.

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Facilitator: CEO or Fractional CMO
Attendees: CEO, Sales Leader, Marketing Leader, 1 to 2 key team members
Frequency: One-time meeting before launching monthly results meetings

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1. Confirm the Growth Goal (10 minutes)

Clarify the growth goal for one specific part of the business.

- New business revenue target
- Existing customer revenue target
- Timeframe
- Which business line or service area this goal applies to

Notes:

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2. Align on a Simple, Shared Funnel (10 minutes)

Use a practical funnel the whole team understands.

- Awareness: activity and visibility with the market
- Interest: people engaging or exploring what you offer
- Commitment: real sales conversations and decisions
- Relationship: customers stay and stay connected

Discuss and align on:

- where sales leads
- where marketing leads
- where they overlap

Notes:

3. Define Key Terms (15 minutes)

Avoid debates later by agreeing on practical definitions now.

Define:

- Lead
- Qualified lead
- Sales opportunity
- Active customer
- Lapsed customer

These do not need to be perfect. They need to be clear enough for the next 6 to 12 months.

Notes:

4. Select Starter KPIs Across the Funnel (15 minutes)

Choose only a few KPIs that indicate whether each stage is doing its part.

Awareness

- impressions
- reach
- website traffic
- networking activity

Interest

- website conversions
- inquiries
- email engagement
- subscriber growth

Commitment

- discovery calls
- opportunities
- close rate
- sales cycle

Relationship

- retention
- active clients

- strategic check ins
- referrals

Notes:

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5. Assign Owners, Data Sources, and Update Frequency (15 minutes)

A metric without an owner will not be reported.

For each KPI:

- assign an owner
- identify where the data lives
- note how often it will be updated
- determine what to do if data is incomplete or missing

If missing data is critical, assign someone to bring it next month.
If not critical, note it and move on.

Notes:

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6. Confirm the Reporting Format (5 minutes)

Start simple.

Use:

- a single Excel sheet
- the funnel view
- metric owners and due dates
- space for notes and observations

Perfection is not the goal for the first month.
Consistency is.

Notes:

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7. Schedule the First Monthly Results Meeting (5 minutes)

Before ending the setup meeting, schedule:

• date and time
• attendee list
• expected inputs
• when metrics should be updated

The first results meeting will follow this agenda:

• review the growth goal
• review KPIs by funnel stage
• optional Funnel Health Score
• identify issues
• discuss what is working
• agree on next steps with owners

Notes:

Optional: Introduce the Funnel Health Score (2 minutes)

Explain that once the team has consistency in reporting, you may add a quick scoring step to help interpret the system.

Score each stage from 1 to 5:

• Awareness
• Interest
• Commitment
• Relationship

Total score out of 20.

Use this only when the data is stable enough to support it.

Notes: