

How To Use This Template

This deck follows the proposed weekly sales and marketing meeting agenda. Obviously, you will need to modify the numbers reported to meet your specific situation, services sold and goals. Here's the high-level agenda:

- Start out with general news and updates.
- Share at least one (possibly more) client success stories to reinforce the GOOD work you are doing for your clients.
- Review the status of the sales department's goals for the month, the quarter and YTD.
- Have the marketing department give an update on:
 - Where they are on their monthly and quarterly goals for MQLs, registrations, etc.
 - The performance of current campaigns running, what's working and what's not.
 - New campaigns planned so everyone is aware of what's coming up.
- Have each rep talk about their individual performance last week, for the month and what their commitments are for next week. In this deck, we're showing an outside salesperson and an SDR. I would encourage you to include your account managers and anyone else who is responsible for carrying a quota.
- Open the floor to anyone with a question, problem or idea.
- End with a contest, game or some other uplifting exercise.
- **DOCUMENT YOUR DISCUSSION!** Summarize and capture everything discussed on a shared portal or document. We use a weekly PowerPoint that summarizes everything in a Teams channel that the entire team has access to.

Company Name

Sales And Marketing Meeting

Updated As Of XXXXXX
Week Of January X, XXXX

CONFIDENTIAL!



News And
Updates!!!

Big Wins, News And Updates:

- Any general company news.
- Changes to the sales process.
- New technology being introduced.
- New hires/fires.
- New products and services the company is offering.
- Any big WINS for the company or an individual.

1,123 Registered For Boot Camp!

Early Bird Pricing Ends March 21, 2025 84 Days 22 Hours 06 Minutes 17 Seconds



[Agenda](#)

[Speakers](#)

[What's With The Theme?](#)

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The 18th Annual IT Sales & Marketing Boot Camp

Join Us For The Biggest MSP Industry Event For Sales, Marketing And Profitable Growth

April 22-24, 2025 | Dallas, TX | Hilton Anatole

Experience 50+ Expert Speakers, 70+ Business-Building Sessions And Over 75 Of The IT Industry's Hottest Vendors!

Early Bird Pricing Ends March 21st!



Client Success Story Of The Week!



Client Success Story!



Erick Grau

8 reviews • 2 photos



3 days ago

NEW

I recently attended a workshop with Robin Robins and her team, diving into The Marketing Toolkit program, and I have to say it exceeded my expectations. Robin is not about hype—she's the real deal. The strategies and insights she shared were practical, actionable, and delivered with an authenticity that's rare. Her approach to marketing is both innovative and refreshingly straightforward, and I left feeling not only inspired but also equipped with tools I could put to work immediately. I would highly recommend her program to anyone serious about growing their business and sharpening their marketing edge.



Member Success Story: Scott Beck, BeckTek!

First, thanks for the awesome awards gala in December. I know you said it wasn't you, the team put it together. However, it was your vision. Thank you for having it!! Wendy and I are already looking forward to the 2nd annual 😊

Wanted to also advise I loved the Q4 theme. The philosophies behind the closing steps in that pitch meeting. The slide deck layout. It resonated with me and helped move me to a repeatable process. Couldn't coach on the theme if I wasn't implementing it myself. I used it on our 4 qualified leads at the end of the year and closed all 4 of them. We've never onboarded 4 companies at once, a little strain on operations but we are working through it and dialing in our processes. Nice way to wrap up 2024!

Speaking of 2024, we experienced a 26.78% growth in top-line revenue, passing through the \$2 million mark for the first time. Profit stayed flat for the year; however, that was because we decided to invest the profits back into the company and hired some additional staff to help with capacity to handle continued growth while maintaining being fully capitalized (I love the peace of mind that rainy-day fund gives me).

As always, Wendy and I are so grateful to have met you and for being accepted into this amazing community you built. You have been inspiring, watching the growth you have had (you've come a long way, baby!!!) and I have made lifelong friends within the group...TMT staff, IT peers, vendors...etc.

Thank you again for the amazing impact you've had on our lives.



Q1 And January Goals



Overall Sales Team ARR Goal

Q1 Sales Goal	Q1 Sales Actual	% To Goal
\$3,113,200 (\$1,037,733 Per Month)	\$992,000 (\$2,121,200 To Go)	32%

2025 Sales Goal	2025 Sales Actual	% To Goal
\$16,900,892	\$992,000	6%

Q1 New ARR Goals By Rep

RED = Behind Goal

BLACK = On Pace

GREEN = Goal Achieved

Who	When	Q1 Quota	Actual Quarter To Date	% or (+/-) to Goal
REP NAME	Q1:	\$1,245,280	\$415,093	33%
REP NAME	Q1:	\$X	\$X	
REP NAME	Q1:	\$X	\$X	
REP NAME	Q1:	\$X	\$X	
TOTAL:	Q1:	\$3.1M	\$992,000	32%

January ARR Goals By Rep

Ranked By Gross	Ranked By % To Quota	Min ARR Quota	ARR Quota	Actual	% To Quota
1	REP NAME	\$387,000	\$415,093	\$415,093	100%
2	REP NAME	\$X	\$X	\$X	X%
3	REP NAME	\$X	\$X	\$X	X%
4	REP NAME	\$X	\$X	\$X	X%
	Totals	\$2,168,600	\$3,113,200	\$1,245,280	40%

January Appointment Goals

What	Who	Goal	Actual	% or (+/-) to Goal
SDR Generated Appointments Scheduled	NAME	80	73	91%
SDR Generated Appointments SAT	NAME	52	53	102%
SDR Generated Appointments Sit Rate	NAME	65%	73%	8%+
Marketing Self-Booked Scheduled	NAME	62	64	103%
Marketing Self-Booked SAT	NAME	40	39	98%
Marketing Self-Booked Sit Rate	NAME	65%	61%	-4%
Advisor Generated Scheduled	NAME	23	18	78%
Advisor Generated SAT	NAME	18	15	83%
Advisor Generated Sit Rate	NAME	80%	83%	3%
Total Scheduled	NAME	165	155	94%
Total Sat	NAME	116	107	92%
Blended Sit Rate	NAME	70%	69%	-1%

January Sales Generated By SDR Appointments

Ranked By Appointments That Closed	Rep	Booked	Sat	Sold	Close %
1	NAME	24	14	8	57%
2	NAME	20	12	6	50%
3	NAME	10	9	1	11%
4	NAME	10	5	0	0%
	Total	64	40	15	38%

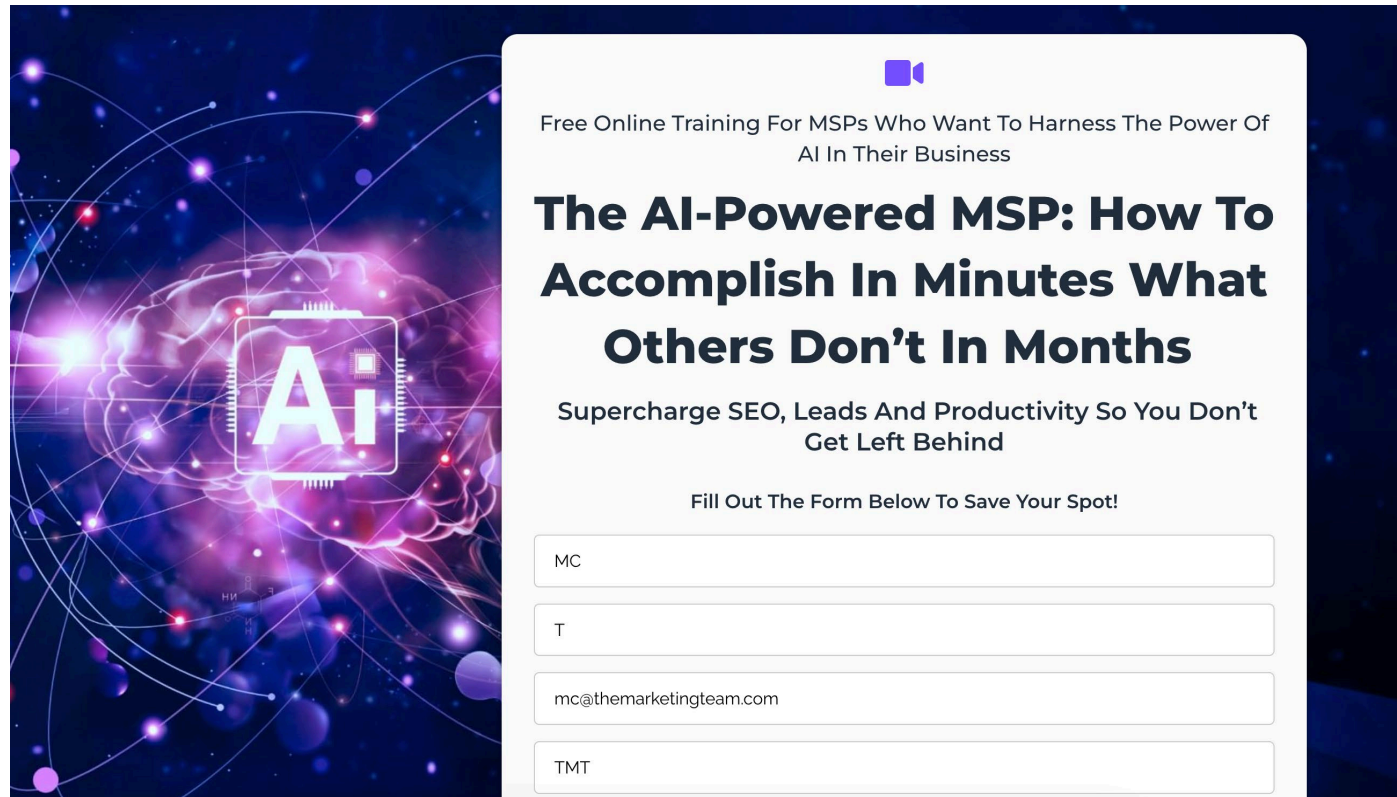
Marketing Team Update



Marketing Metrics: January And Q1

	1/17-1/23	MTD	Month Goal	% To Month Goal	Q1 Actual	Q1 Goal	% To Q1 Goal	YTD Actual
Raw Leads	4	10	10	100%				
MQLs	2	7	6	117%				
Reactivated Raw	3	3	4	75%				
Reactivated MQLs	1	2	3	67%				
Total MQLs	3	9	9	100%				
Appointments Booked	1	5	7	71%				
Appointments SAT	1	4	5	80%				
Cost Per MQL (Marketing Only)	\$1,025	\$1,400	< \$1,300	-\$100				
Total Cost With SDRs/Mgmt.	\$2,450	\$2,600	< \$2,500	-\$100				

January 16th Webinar On A.I.



The image shows a registration form for a webinar. The form is white with a dark blue background on the left side featuring a glowing brain with 'AI' inside, surrounded by circuitry and data points. The text on the form is as follows:

Free Online Training For MSPs Who Want To Harness The Power Of AI In Their Business

The AI-Powered MSP: How To Accomplish In Minutes What Others Don't In Months

Supercharge SEO, Leads And Productivity So You Don't Get Left Behind

Fill Out The Form Below To Save Your Spot!

MC

T

mc@themarketingteam.com

TMT

Presenters: Mike and MC

Audience:

- 1) Unconverted leads
- 2) Members (not registered)

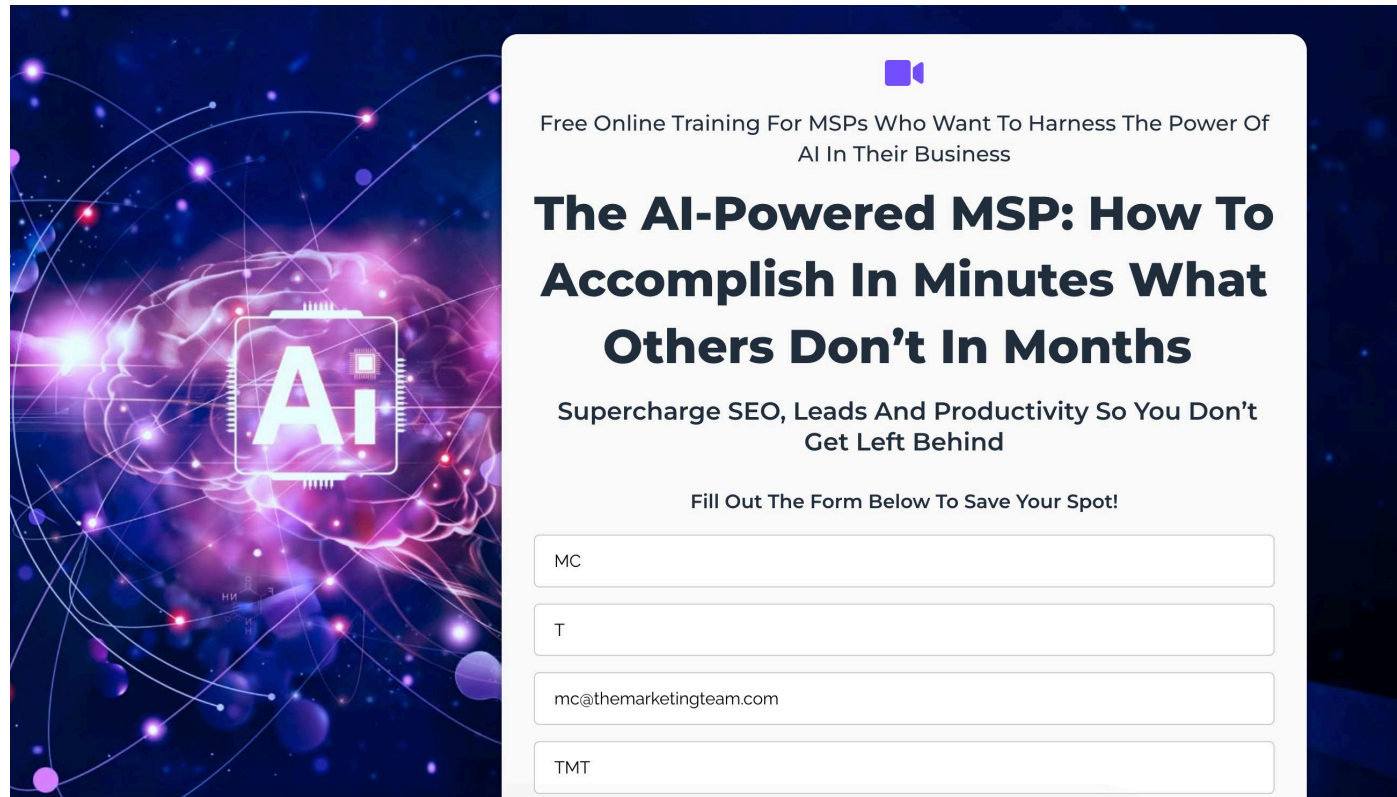
Purpose: Register members for Boot Camp

Results:

288 Registered
180 Attended
18 Tickets

<https://webinar.technologymarketingtoolkit.com/ai-powered>

January 16th Webinar On A.I.



The image shows a registration form for a webinar. The background is a dark blue space-themed graphic with glowing purple and pink lines and dots. On the left, there is a stylized brain with a glowing 'Ai' logo inside it. The form itself is white with a purple video camera icon at the top. The text on the form reads: 'Free Online Training For MSPs Who Want To Harness The Power Of AI In Their Business', 'The AI-Powered MSP: How To Accomplish In Minutes What Others Don't In Months', 'Supercharge SEO, Leads And Productivity So You Don't Get Left Behind', and 'Fill Out The Form Below To Save Your Spot!'. There are four input fields with the following text: 'MC', 'T', 'mc@themarketingteam.com', and 'TMT'.

Free Online Training For MSPs Who Want To Harness The Power Of AI In Their Business

The AI-Powered MSP: How To Accomplish In Minutes What Others Don't In Months

Supercharge SEO, Leads And Productivity So You Don't Get Left Behind

Fill Out The Form Below To Save Your Spot!

MC

T

mc@themarketingteam.com

TMT

Next Actions:

- Customer Success Managers to follow up with those who registered to see if they want to be in-person or virtual.
- Mike to set up the replay and initiate a second round of marketing to members next week.

<https://webinar.technologymarketingtoolkit.com/ai-powered>

Active And Upcoming Marketing Campaigns For SDRs To Call

Endorsed Mailing Campaign With Mario Zaki

- Letterhead mailer to drop February 7th
- 5-call sequence and e-mails to start February 10th
- Facebook retargeting set up
- **URL:** www.MSPmarketingTeam.com/mario
- **List:** 1,500 smaller MSPs selling break-fix in US and Canada
- **Offer:** Free MSP Marketing Strategy Session



That's me with the "redhead" who helped me turn my business around.

"How I Added \$678,108 In New Sales And \$89,803 In Additional Profits To My MSP In Under 12 Months"

Dear Fellow MSP,

If you're struggling to grow your MSP and feel overwhelmed and stressed-out because you don't know how to get **QUALITY** clients in the door and grow sales and you constantly worry about money, **PLEASE** take a minute to read this letter.

I know *exactly* how you feel because that's where I was.

For 15 years, I was **trapped in break-fix work** with barely any recurring revenue, constantly chasing invoices and working early mornings, late nights and weekends just to stay afloat. I was grinding nonstop, hoping for referrals to *maybe* come in, but there was no predictability, no growth and definitely no time for vacations.

Then one night, everything changed.

After a long day of work, I grabbed the mail out of the mailbox on my way home from picking up Chinese food for my family. As I sorted through it, **one big red envelope** caught my attention. Inside? A letter with a real dollar bill stapled to it from some redheaded marketing guru named Robin Robins.

She claimed her MSP marketing program could help me finally fix my broken business and bring in **one or two new clients a month**. At the time, that sounded *ridiculous*. It took me **months** just to get one referral. But something about that letter got me thinking.

What happened next was almost like a movie...

I cracked open a fortune cookie from the Chinese takeout and the message said: "Don't be afraid to take a chance when the opportunity of a lifetime appears." (This is **100% true!**)

To me, it was a sign that I should take a leap of faith and try her program out. What did I have to lose? I had already proven to myself that "my way" wasn't working, and "hoping" for something to change wasn't a plan. So I enrolled that week.

www.mazteck.com



Individual Performance



January Plan: REP NAME

	Goal	MTD Actual	Percentage To Goal
ARR Goal:	\$444,000	\$412,000	93%
Average ARR Sale Goal:	\$18,500	\$20,600	+\$2,100
Total # Of Sales Needed:	24	20	83%
# Of Open Opportunities To Close:	2	2	100%
# Of Sales From Webinars, Events:	7	6	86%
# Of Sales From New Consults:	15	12	80%
Close Rate Needed From New:	50%	39%	-11%
Total Appointment Slots Available:	60	60	N/A
Company-Provided Appointments Sat:	27	28	103%
Self-Generated Appointments Sat:	3	3	100%
Total Appointments Sat:	30	31	104%
Prospects Worked:	100	70	70%
Dials Made:	350	245	70%

REP NAME: Last Week

Last Week	Booked	Sat	Sold	Consult Close Rate	Sold Outside Of Consult	Rolling 4-Week Avg Close Rate	Rolling 4-Week Average Sale
New Consults	10	6	5	83%	0	54%	\$18,488.34
Client Consults	5	4	4	100%	0	78%	
Off White Consults	0	0	0	0%	0	N/A	
Totals	15	10	9	90%	0	62%	
ARR	Goal	Actual	% To Goal				
	\$100K	\$254,214	254%				

REP NAME: This Coming Week

Appointments Scheduled	9
Client Consults Scheduled	4
Open Appointment Spots	8
ARR Goal	\$120K

Weekly Focus:

- 2 New In Pipeline To Close
- 5 Open Opportunities (0 Past Due)
- Hold Webinar And Follow Up
- Continue To Work Event Leads

REP NAME

Tier 1 SDR

Weekly Focus

- Confirm & Qualify Self-Booked
- Continue To Work Opt-Ins
- Marketing Planning Workshop Attended Follow-Up
- Channel Pro Tampa (Out Of Office For 2 Days)
- Mario Zaki Campaign (When Mailed)

Commit For The Week

- Dials: 310
- Bookings: 15
- Sat: 7

RED = Behind Goal

BLACK = On Pace

GREEN = Goal Achieved

	January Goal	January Actual	% to Goal
Dials	2,300	2,342	102%
Consults Sat	15	17	113%
Sit Rate	65%	50%	-15%

	Last Week Commit	Last Week Actual	% To Goal
Dials	550	554	101%
Bookings	5	4	80%
Sat	5	4	80%

January: Goal Achieved

**This Week's
High-Roller SDR!!
Most Consults Booked!
Austin Meadows**





Hearts And Hustle Raffle



First Prize: \$250

Second Prize: \$100

Third Prize: \$50

- Every rep (SDR or Advisor) who books and/or has an appointment sit gets **one scratch off** into the draw.
- Every SDR who has an appointment CLOSE gets **one scratch off**.
- Every Advisor who closes a sale gets **three scratch offs** into the draw.
- On Monday after **Valentine's Day** (2/17), we'll do a raffle draw for the gift cards and everyone will get their scratch offs!