

**Action Minutes -** Sales Team Meeting

**Attendees:**

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| Pawel Baca | Sales Director |
| Sarah Lisi | Administration Manager |
| Dexter Muir | Sales Assistant |
| Jennifer Finn | Sales Assistant |
| Jamie Kerr | Sales Assistant |

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| **Action** | **By whom** |
| **Training**  The Sales Team recently attended training covering the company’s policies and procedures around sales strategy. All staff must complete the online survey and quiz — the link was sent by e-mail yesterday. | Pawel  Dexter  Jennifer  Jamie |
| **Sales from 25th Anniversary Event**  We have to complete the quote for Mrs Cleaver who reserved a plot during the 25th Anniversary event.  The Quote file should be completed to calculate the total cost of her house using the information contained in her House Specification form. Print Mrs Cleaver’s quote in value view on one page and formula view on one page. | Sarah Lisi |
| **Budgets**  Lydia would like to know if we are keeping within budget for each site in the current year. The Summary sheet within the file Suppliers needs to be completed to calculate the percentage over budget for each site. Print the summary sheet in value view on one page and formula view on one page. | Sarah Lisi |
| **Sales Information**  The pivot table needs to be amended to include an additional column to show average sales at each location and site. New column heading should be amended appropriately. Print this information. | Sarah Lisi |
| **Staff Incentive**  The company has decided to offer a free holiday as a reward for the sales person with the highest sales. Using the file Houses — for each sales person please find the number of properties sold to date.  Print this information for use at the next Board Meeting. | Sarah Lisi |