Your Guide to Planning a Sales Kick-Off with Lasting Impact



Showpad

Introduction

The way your sales organization starts its fiscal year sets the stage for annual performance across the team. A sales kickoff meeting (SKO) is an essential step in getting your sales team together to collaborate, review previous processes and performance, and set goals and expectations moving forward for a lasting impact.

It's never too early to start thinking and preparing for SKO. These meetings can be a large investment – an average of $1,000-2,000 per rep! – so you want to make sure that each person on your sales team gets the most out of it, and that your business gets the return on investment you're looking for. Keep in mind that this is a general guide, and how you run your SKO may depend on company size, industry and other factors.

Chapter 1
The WHY

Objectives

Before you begin planning any of the logistics of your SKO, you need to think strategically. Why have you decided to hold this event? The answer shouldn't just be that you always hold a sales kickoff. This occasion is an opportunity for sales leaders and c-suite executives to set goals for the rest of the year, and get the sales team rallied behind those goals and how to achieve them over the next 365 days. Frame them from the viewpoint of your sales reps -- what do the results mean for each member of the team? This should be the driver for the agenda and content of the SKO.

Perhaps your sales methodology is changing, or due to reorganization you are switching up your process or adopting new technology. Maybe your organization is expanding geographically, is incorporating an inside sales team for the first time or wants to start selling through partners. It could just simply be that you want to sell more and sell faster. Regardless, the new year often brings changes that disrupt the status quo, and it's important to get everyone on the same page to promote success and avoid confusion. Setting specific and realistic goals gives everyone a clear picture of where they should be in a year's time, and what they need to do to get there.

Plan

Once you've finalized your objectives, you must have the appropriate content available to your sales team in order to achieve them. With help from marketing, determine what materials will help reps learn the proper information and give them the ability to practice and review whenever necessary. A good place to start is a review of this year's performance; a detailed look at the present paves the way for where you want your sales reps to be in the future. You may have to wait for the end of your fiscal year to get the full picture, but organizing the information and having it ready to plug in numbers will save you a headache come day one of next year. After a run-through of this year's numbers, move into where you'd like them to be in 12 months, how they impact the larger business goals, and how each rep contributes to reaching the goals. This is where you want to clearly communicate the objectives you have set and what the plan is for attaining them.



Success Metrics

Within each goal should be various metrics for how to determine success on individual and team levels. Establishing these ahead of time makes it easy to analyze performance throughout the year and revise strategies based on results. On an individual level you can measure performance indicators like number of calls made, meetings scheduled, or demos given as well as use of sales decks and other marketing materials that give insight into what is working and what isn't. For instance, if a certain rep leverages a specific piece of collateral and has closed a high number of deals, you can conclude that the piece of collateral is more effective than others, encouraging the rest of the team to follow by example. On a team scale, measure the average length of sales cycle, total closed opportunities, revenue generated, and more, comparing to previous years or quarters to determine whether there has been improvement.

Content

+

Context

=

Maximum Impact

Chapter 2
The HOW

Now that you've got your objectives set and a plan for how to accomplish them and measure whether they have been met, next you'll need to get all the logistics squared away, such as:

Location and venue

The setting of your SKO should be a positive learning environment that minimizes outside distractions. Where you choose to hold the event can depend on a number of factors – for instance, if you plan to hold your SKO over an entire week, you may want to choose a place that is more interesting than a small, stuffy conference room.

Attendees

You obviously want your entire sales team to participate in your SKO, but you may also want to include people from other departments who work directly with sales and have a role that directly impacts the objectives you've set (i.e., sales enablement, marketing, account management). It is also wise to designate one person, not on the sales team, to review all presentations before the meeting, make sure the event keeps moving and follows the agenda and timeline, and distribute materials as needed before, during and after the SKO.

Content

Creating relevant, high-quality content that engages sellers is one of the most difficult parts of planning for SKO. It also happens to be the most important aspect of the kickoff. Without compelling content, sales reps may have trouble focusing in sessions and retaining and leveraging what they learn. There are two types of content that must be considered:

1. **Customer-facing content.** The start of a new year is a great excuse to refresh existing sales materials and introduce new pieces, such as pitch decks, product or feature demos, client tools, call scripts, and case studies that reach customers in the right place at the right time to engage customers. Marketing and sales enablement teams can present these materials at SKO, explaining the thought process and giving context to every piece: the target audience, how it should be used, when it should be used, how to follow up, etc.

   In addition, marketing can share new lead generation and nurturing campaigns they plan to run over the course of the next year. Reps are bound to have questions, and potentially objections, so set aside for discussion and debate between marketing and sales.

2. **Session content.** Along with the year in review and collateral overview with marketing, there are other recommended sessions to take into account. These sessions will need their own content that is separate from the customer-facing items the marketing team presents:

   - A keynote from leadership sharing their vision for the year ahead is effective in inspiring reps and allowing them to see the bigger picture.

   - Sessions covering subjects that impact reps every day; things like territories, quotas, new compensation models, product overviews and sales methodologies.

   - Time for breakout team-building exercises for sales to collaborate with their peers within the team, as well as those in marketing.

   Appropriate content materials must be created to support these sessions and keep reps interested, some of which can be distributed before SKO begins. There are likely some housekeeping items that need to be taught or reviewed for the team, much of which can detract from the larger goals of the event. Things such as the process for reporting expenses or logging PTO can actually be provided before the SKO to ensure the team has the proper information, but that no time needs to be wasted on more administrative tasks.

Theme

Setting a theme is optional, but it can add some excitement and increase engagement over the duration of the event. It can tie into the location or time of year of the event; regardless, it should be relevant to your SKO objectives and messaging.

Speakers

Select individuals to speak who will demand respect and attention from all involved. These speakers can be other department heads within the company or people outside your organization, such as a customer. Having a recently signed client come in and speak to reps allows them to understand and empathize with the experience from the client point of view. Speakers should submit their presentations well in advance so you can review their work and fit it into the agenda where it makes the most sense.

Recognition

Your sales reps work hard to close deals and bring the company success, and SKO is the perfect time to acknowledge and reward individual achievements from the previous year. When announcing an accomplishment, have the rep or team speak to it and share their experience. Hearing from peers helps other members of the team learn new tactics and best practices. You may also consider including individuals outside of sales who have excelled in supporting the sales reps – pre-sales engineers, professional services, client success, marketing, finance, and legal – to recognize the team aspect of every win.

Fun

Learning is the most important element of SKO, but it is also a time where the group comes together, and you would be remiss to not include some time for team bonding. A happy hour, dinner or other fun outing makes reps feel valued in the organization and appreciative in their role. You can also give out branded swag items that play into your theme.

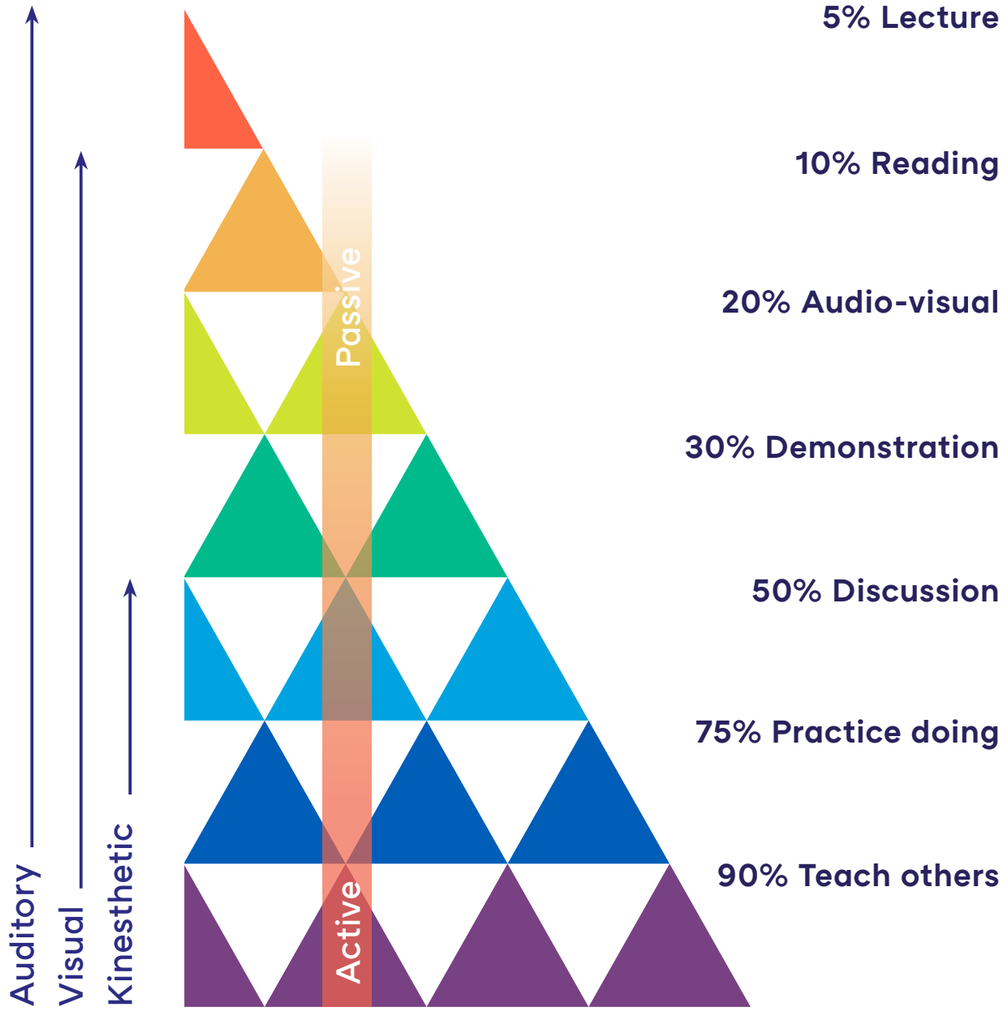
Chapter 3
The Follow-up

Just because SKO is complete doesn't mean your work is done; you want to be prepared to continue the learning over the remaining 51 weeks of the year. Relationships, inspiration and excitement will be retained after the SKO, but specific information and skills are unlikely to stick without reinforcement.

If you only cover the goals and steps to reach them over the course of the three or four day event but never address them again, retention amongst the team will start to drop off, and those goals become essentially unattainable. According to the National Training Laboratory, retention rates climb to 75 percent when people practice skills by doing.

Learning Pyramid

When the sales team returns to business as usual after the kickoff, reinforcement should begin with ongoing coaching, training and certifications.



Adapted from the NTL Institute of Applied Behavioral Science Learning Pyramid

Training

To keep the momentum going after your kickoff, sales leaders must continue to emphasize what was taught, boost energy levels across the team and enforce ongoing learning. Offer digital content that repeats, reinforces and extends what was presented at SKO. Be sure to update these materials regularly to keep things fresh and interesting, and don't forget to track each rep's engagement with the content and give those with low engagement a nudge when necessary.

Certifications

A sure-fire way to know that your SKO sessions have stuck and that reps understand the material and can execute on that information is with certifications. You can certify their ability to demonstrate the new company vision originally presented by leadership, mastery of the newest technical features, knowledge of competitive differentiators, or other important topics that were covered in the kickoff. For the most important skills, have your sellers take quarterly certification tests to give them practice and reveal areas that need improvement.

Coaching

Sales coaching is a practice that supports reps and helps improve their performance through regular individual attention. in their roles and allows them to grow within your organization through consistent guidance and regular meetings with their managers. Video coaching encourages sellers to practice pitches, demos and other more focused interactive capabilities like handling objections and asking discovery questions. Continuous practice is the best way to learn, an don average sales people practice six times before they consider their video ready to submit.



Conclusion



Your 2019 sales kickoff will set the tone for the remainder of the year, so you want to make it as engaging and impactful as possible. Inform your sales team while keeping them energized, and hold them accountable with continuous training, certifications and coaching. Providing them with the right tools and support will benefit their own performance as well as the growth of your entire organization. Tackle your objectives and goals and you'll find that the agenda and content will come much more easily. It's not too early; start now and you will have your best SKO ever!

6 Actions you can Take Today to Plan for SKO

1. Set Objectives & Success Metrics

Your objectives drive what your sales kickoff will look like. These objectives should tie directly into the overall business goals for the year. If you set the goals late in planning, you will likely have to go back and adjust much of the agenda. Establish metrics to determine whether these goals are being met on a monthly, quarterly and annual scale.



2. Select location, theme and participants

Think beyond your office conference room for a fun place that will encourage learning and excitement. However, keep in mind that certain settings may distract and take away from the seriousness of the event.

In addition to your sales leaders and reps, consider people from other departments who work closely with the sales team that could benefit from attending. You can also begin thinking about who will speak at the meeting and who will run the show and keep things on track.

Set a theme to make the event more fun and tie all the sessions together. It can relate to the location of the meeting, your industry, or other aspects of your business.

3. Create compelling content

What content will support your goals and educate sales reps to help them get there? Craft learning materials that will engage reps and help them retain the information. Different types of content play a part for SKO and beyond. The content you present to sales at the SKO will differ from the collateral you present to customers. Update existing sales materials to support the new fiscal year objectives, and create new materials, all of which can be reviewed and discussed during the kickoff.

4. Recognize achievers

Acknowledge those who have realized tough goals and overcome obstacles over the previous year with individual and team rewards – in sales and in the teams that support sales. Use their experiences as a positive example for fellow reps to follow.

5. Follow-up with certifications and continuous learning

Keep the momentum going throughout the year by bolstering what reps learned during SKO with ongoing training and coaching, leveraging mobile technology for convenience. Certify on the most important skills to identify what reps require additional coaching.

6. Have fun

Make it a memorable SKO in more ways than one! Your reps work hard during the year; show them you appreciate their efforts with a dinner or party and some branded swag they can take home with them. Scheduling side entertainment also serves as a catalyst for networking and collaboration.