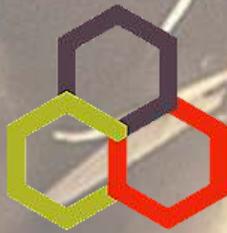


Best Practice Sales Kickoff Meetings



Scale Your Sales

Janice B Gordon

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Is The Sales Kickoff Meeting Even Necessary?

Without Sales, you do not have a growing business the Sales Kickoff Meeting is an opportunity to refresh, reset and kickoff a new impetus for growth.

This is more relevant now than ever; in light of the global economic crisis, constant market shifts, changes in buyer behaviour and the recent global pandemic, the one constant thing is change. If you are not evaluating and adapting and realigning your strategies to account for the market shift, you will lose all competitive advantage and decline.

As the name suggests, the aim is to kickoff growth by launching a new product, process, geography, technology, behaviour, or attitude. It is not, as I have found many kickoff meeting to be, another training day or worst, the launch of the new targets or quota. It is not to say that you cannot include performance targets, but if this is all you do, if this is what your Sales Kickoff Meetings look like, then you are missing an opportunity to develop and inspire.

I want to talk to you about how you can revitalise you Sale Kickoff Meeting to be the most effective and result drive event of the year. An event that will pack a punch to deliver motivated and focused sellers that are aligned to company values and committed to delivering on the business goals.

I am going to walk you through a 14 Point Checklist that leads to the Ultimate Sales Kickoff event. I will walk you through why vision and leadership are critical, who to invite, how to pack a punch in content and delivery, and the importance of interaction and fun and follow-up. You will be able to download this checklist as a free resource from my website [Scale Your Sales.co.uk/Checklist Sales Kickoff](https://ScaleYourSales.co.uk/Checklist%20Sales%20Kickoff).



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Think Bigger and Broader

If you are bringing in something that will disrupt the status quo, it is critical that everyone is on board and to do that, you need not present it as a fait accompli. Rather a Kickoff should be at the end of a consultation, trial and feedback process involving all relevant users and stakeholders. A Kickoff is saying, we are now all aligned, and we are on board to achieving this vision. We understand the behaviour change needed and see a plan of how we are going to do it. We are eager to kickoff and get started.

A new year, or financial year, or a new market focus will bring changes that must disrupt the status quo, and it is essential to get everyone on the same page to promote success and avoid confusion. Setting specific and realistic goals gives everyone a clear direction of where they should be in a year, and significantly why change, and what they need to do to achieve the vision. However, no one is going anywhere unless you are selling the vision first. This does not start in the Kickoff meeting but starts with the business mission, the annual business goals, the objectives, and the strategy. The strategic development includes consultation with the relevant users and stakeholders, giving feedback that aligns the operations to the leadership aspirations.

The Sales Kickoff Meeting is an opportunity to bring people together, build company values, bridge understanding between silos, launch new products and services or innovations, train, and showcase success and best practice. Ideally, bring in customers to share their experience, brainstorm problems resolution and customer success.



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What Participants Want:

In a Sales Kickoff Meeting, the participants want to know:

- What are we doing?
- Why are we doing it?
- How will it work?
- What part do I play?

The first two are about trust, and the last two are about commitment to the organisation.

Definition of Success:

My definition of a successful Sales Kickoff Meeting is if the outcome is 50%-100% of the following criteria:

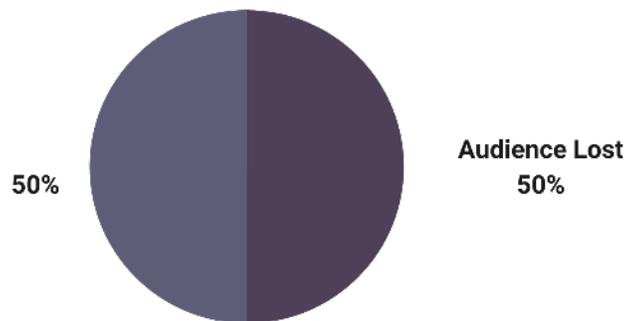
1. Learn something new that I can implement.
2. Able to do something different that I see a need for.
3. Feel inspired and motivated to serve and sell.
4. Feel a part of something great – the vision and mission – know what part I play.
5. Understand, engaged, and committed to the process/journey and vision.



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A New Perspective

I know many Sales Kickoff Meeting start with the past year's performance and progress to the new year's targets. Some will be feeling good about their past performance, but others will not and will dread this part of the meeting. Approximately 50% of sellers do not hit quota. The system is broken. The problem is that if you have lost 50% of your audience, you will not engage them on the new vision. 'I did not hit the quota last year; how am I going to hit it this year?' They have now switched off and do not believe in the vision, even if it is a customer market centric vision.



Sales is Not a Sales Problem!

Instead, start with the company vision and mission, and if it is not all about the customer, you need to revisit the company mission. Sellers and sale organisations are notoriously inward-looking and product focused. So, the context is all about them!

If you can make the context all about why we serve and sell, sharing customer success stories will give the performance figures the context needed to inspire future success. Past performance results should be high level in a Sales Kickoff Meeting and covered in detail in the 121 coaching sessions. Yes, celebrate success. However, the celebration is an opportunity to share best practice and customer success stories. This is the time to sincerely focus on the future and how you will do what you do best, better for your customers.

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The Ultimate Sales Kickoff 14 Point Checklist

The Leadership

1. **Set the vision** with a keynote from the CEO sharing their vision for the year ahead, allowing sellers to see the bigger picture, the rationale, and the business mission. The leadership must re-energise the sales team and remind them of past successes and revitalise that energy to prepare for future success. Make the vision tangible, provide them with living visuals of what success will look like in the future.
2. **Invite the entire team** and stakeholders along with the people from other departments. Those who work directly with sales or have a role that directly impacts these outcomes, including representatives from Finance, Operations, and certainly Marketing, if the is a separate function. Along with sales enablement, marketing, account management, AE, SDR BDM, CRO CMO, VP Sales.
3. **Secure a senior-level champion** for the event, whether this is the CEO or C-Suite. If your senior leaders do not believe the sales engine is essential enough to champion and attend, then you do have bigger issues. Ensure the seller feels that their voice is being heard, hence needing a senior champion or C-suite to be in attendance and accessible.
4. **Secure external speaker(s)** selected speaker who will demand respect and attention from all participants. When the team have heard from the people they know, there is a tendency to switch off (nothing new here). These speakers can be other department leaders within the company or people outside your organisation, such as customers, board directors and thought leaders. Ensure your speakers reflect the diversity within your organisation or the diversity you want to achieve. If you cannot see it, you cannot believe it. With travel no longer a factor for online events, your potential speaker pool is broad. Having a wide variety of speakers will give the participant a breath of views and enjoyable experiences.



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The Process

1. **Organise around a theme** and sub-themes of skill building such as digital disruption, presenting on video, new customer behaviours, social selling and all the areas that require new skill building for the current challenging times. Look for ways to carry the key theme into the year and KPIs.
2. **Professionalise the meeting with a facilitator** or master of ceremonies who can serve as a common thread between sessions and drive excitement. Sellers are bound to have questions and potential objections, so set aside time for discussion and debate and facilitators, following the agenda timelines, ensuring the event keeps moving and helping to progress the open and constructive conversation.
3. **Consider a mix of pre-recorded content** so organisers can take a breath or interact without also having to monitor continuous live sessions. Content must be relevant and high-quality that engages sellers, including bite-sized chunks of content with time for reflection and reaction. **Panels** are a great way of engaging with diverse viewpoints from multiple perspectives, such as customers, partners, or leaders, all at once.
4. **Thoughtfully designed breakout** groups also help to engage the seller in building connections and deep-dive themed discussion subjects. Keep these groups small to foster interaction. A virtual Sales Kickoff Meeting has the advantage of tailoring content and delivery to be specific to individual groups of sellers, with the ability to run multiple meetings simultaneously.
5. **Hybrid events have the advantage** of opening the scope and increasing the breadth of the experience. However, in a virtual world, with the loss of that in-person experience, virtual Sales Kickoff Meeting must ensure the agenda is an equal mix of learning sessions, interaction, and fun activities. If online, select the platform and the speakers that will enhance networking, engagement, and learning. There is nothing worse than a boring online speaker.



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Your People

1. **Recognise and reward** individual achievement; better still have the team share their successful experiences. Acknowledge individuals outside of sales operation who have excelled in supporting the sales function, such as pre-sales engineers, professional services, client success, marketing, finance, and legal; recognising the team aspect of every win is essential.
2. **Networking and interaction**, design the event to achieve the stated outcomes and interactions. You can create live polls to keep people interacting or work to pair people in team activities randomly. Create ways for colleagues and leaders from different regions or functions to step outside their circles and make valuable connections. This could happen in breakout rooms or speed networking platforms. Many excellent platforms enable networking, so participants do not feel they are missing the in-person watercooler moments.
3. Encourage **team building** and cross-collaboration exercises with peers not in their team. Create workshops activities and team-building exercises that offer an opportunity for you to encourage healthy competition. Let each function compete against one another; their morale and efficiency will improve considerably, and so the Sales Kickoff experience will be fun and productive.
4. **Whether online or offline, make time for fun**, create a positive, fun learning environment, and create opportunities to connect informally. A happy hour, wine gifts, or play games. Fun activities engage and bond sellers to feel valued and connected to the organisation. Some companies may initiate their annual fundraising drive or champion volunteer activities that create a sense of community internally and giving back externally.
5. **Post-event follow-up process**. Unfortunately, one of the biggest mistake sales organisations make is not riding the wave of a Sales Kickoff Meeting. Do not let a good effort go out the window by ignoring the need to continue the conversation. Plan how the ideas, learnings and collaborations generated become part of your enablement track for the year ahead? Provide forums for continuing the discussion, whether this is through ongoing meetings or an internal social platform. Encourage participants to identify their top 3 takeaways and how they will apply them moving forward. Create a solid plan for requesting feedback through a survey and an ongoing action plan for responding to and actioning the event feedback. Plan the follow-up on feedback and continuous measurement of outcomes and takeaways.

My aim is that you will make your Sales Kickoff and event that will align not only the entire team but the whole organisation from the most senior to listen and align the business goals and the operational people and processes to serve and sell for your best year yet.

I hope this 14 Point Checklist to the Ultimate the Sales Kickoff, will help your team to punch above their weight as they serve their customer and sell through these challenging times. Remember to go to [Sales.co.uk](https://www.sales.co.uk) / Checklist Sales Kickoff to get your checklist.

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Resources

I know there has been a lot of information to absorb, so I have created a go to <https://scaleyoursales.co.uk/> Checklist Virtual Training Coaching.

Connect with my on LinkedIn Janice B Gordon, or any other network you prefer.

Do not forget to Listen, Rate and Review Scale your Sales Podcast on iTunes <https://podcasts.apple.com/gb/podcast/scale-your-sales-podcast/id1480686554> or watch on my YouTube Channel https://www.youtube.com/playlist?list=PL8DMnLfkC_JfPvXhWkIAVdJAYbFphI2RI

Other resouces:

<https://blog.hubspot.com/sales/sales-kickoff>

<https://www.salesforce.com/resources/articles/virtual-sales-kickoff/>

<https://www.clari.com/blog/how-to-run-a-virtual-sales-kickoff/>



Midcap companies hire me, Janice B Gordon, The Customer Growth Expert, to help them re-imagine revenue growth through customer excellence and sales. My Scale Your Sales Podcast and framework develops leading-edge capabilities to secure, retain and grow key customer relationships for long-term value and partnership. I am a professional speaker and have been delivering keynotes, virtual interactive training, and masterclasses for over seven years.

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