

GUIDE TO THE
ULTIMATE
SALES KICKOFF



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Kickoff Events

Sales kickoffs serve a dual purpose. They bring teams together to celebrate the successes of the past year. Equally important, they set both the tone and goals for the year ahead. Done right they provide the motivation and learning to get everyone off to a fast start.

The goal of this book is to provide clear direction on how to execute kickoff events in a fun, engaging way with proven results. We hope to motivate and inspire you to creatively come up with ways to increase engagement and active learning.

The New Kickoff

In the past many companies brought teams together at the start of the year and subjected everyone to hours of "death by PowerPoint". After a draining few days, knowledge retention was low and motivation even lower.

We see customers succeeding with a new kind of kickoff, one where employees are highly engaged before, during and after the event. Every exercise and piece of content is aligned to the company's sales enablement and revenue goals. Teams head back to the field with a strong foundation to overachieve in the new year.

For one company we worked with, the first step in planning this new kind of kickoff was to diagnose the biggest issues from the preceding year. Once the top issues were agreed on, the goal was to accelerate learning by front-ending the event with assessments, surveys, and pitch practice to better inform the event agenda, keynotes, and workshops. Content and learning goals were detailed and carried through the pre-work, onsite event workshops and post-event reinforcement.

The pre-work path was enriched with videos to support the learning goals. Teams completed the pre-work exercises which managers reviewed and provided feedback on. Everyone showed up to the event ready and pumped up because they had started collaborating and engaging with their peers ahead of time on topics aligned with revenue and company goals.

By introducing the content before the event, the learning started early, and the path to successful outcomes was accelerated. The entire event agenda mapped to the pre-work content. The sessions at the event were a direct follow-up from the online pre-work. Besides celebrating the best practices, leaders were able to share real insights into where the teams did well on the exercises and where things could be improved. Normally this cycle of reinforcement would span six to twelve months instead of days and weeks.

The organization had a great quarter. Engagement was super high. Many team members said it was the best sales kickoff they had ever experienced because of the orchestration of the content before, during and post-event.

DOCUSIGN'S TEAMS ARE 100% ENGAGED AND ALIGNED

To drive both active learning and active participation at kickoff, teams at DocuSign were asked to answer two questions with a recorded video story. Their teams responded by recording hundreds of motivational stories. Engagement was high with thousands of views and peer reviews. Goals for the year were set publicly. The virtual high-fiving of learning and sharing goals was a great way to get their teams aligned and doing the best work possible.

DocuSign

Best Kickoff Agenda

It's important to create a kickoff and agenda that's the right mix of celebration, motivation, conversation, action, and storytelling.

It's all about human connection and making people feel like they're part of something much bigger. Your perfect agenda needs to give attendees the context of why and also bring them together—whether in person or at a virtual kick-off.

Share "bigger than you" motivation. Of course, a successful sales kickoff instills the motivation to keep sales reps and leaders going all year long. But that motivation needs some back-up support in the form of inspiration and clear, transparent, and open communication of goals, expectations, and metrics. A sales team can only be the best they can be if they know what success should look like—and if you make it personal to them.

Communicating the difference your company makes to the lives of your customers—or the world at large—will deliver the motivation that everyone is part of something much larger. And, of course, be specific and prescriptive with what your team should do to help make that vision a reality. Present the big picture, then clarify each person's role in the big picture.



Create Breathing Room

With a one- or two-day agenda, there is the motivational piece and then there's the drilldown into the tactics. What will a sales rep's life look like over the next thirty, sixty, or ninety days? Communicating specifics is crucial. But be sure to leave time in the agenda for people to actually talk about the details.

This is another moment where you can bring the element of human connection into your agenda. If you inspire people with amazing energy and motivation but don't allow them to breathe and converse, then you have missed the real synergy that can happen to bring the goals to life after the kickoff.

These conversations can take the form of engaging workshop exercises to discuss the motivational topics and goals at an in-depth and personal level. Drive a discussion of "what it means to me and my role." And don't lose the valuable content produced there. Workshop leaders should collect the sentiments; the final session of the agenda could include a summation of the thoughts and "what we've been hearing from you." The motivation comes full circle because teams are now directly involved and active participants.





Encourage Peer Networking

New connections can also be created with peer networking. Help people meet each other who wouldn't normally meet—whether due to different territories, departments, you name it. You can do something tactical and informal during the introduction of a session by saying, "Everybody walk up to somebody you don't know and tell them your biggest accomplishment for the year."

You can also take a more formal approach to facilitate these interactions and conversations. Why not let developers meet salespeople? Why not let customer support people meet developers? Why not let salespeople meet marketing people? Get people to share and talk with others they might not ever connect with, and introduce their ideas to each other.

True inspiration and innovation can happen when we break out of our own bubbles. In the end, it's all about driving human connection through conversation—and the best discussions are those around the themes and motivations anchoring the overall kickoff and the ultimate drivers of business success.

YEXT SCALES BEST PRACTICES ACROSS THE ENTIRE REVENUE TEAM

Yext, the leader in Digital Knowledge Management, wanted to engage their teams in active learning before the kickoff so they decided to crowdsource win stories from across the organization. They challenged everyone to record a short win story video and received more than 250 submissions which were then watched and peer reviewed more than 2000 times. The act of peer reviewing stories helped their teams learn sales best practices faster than ever.

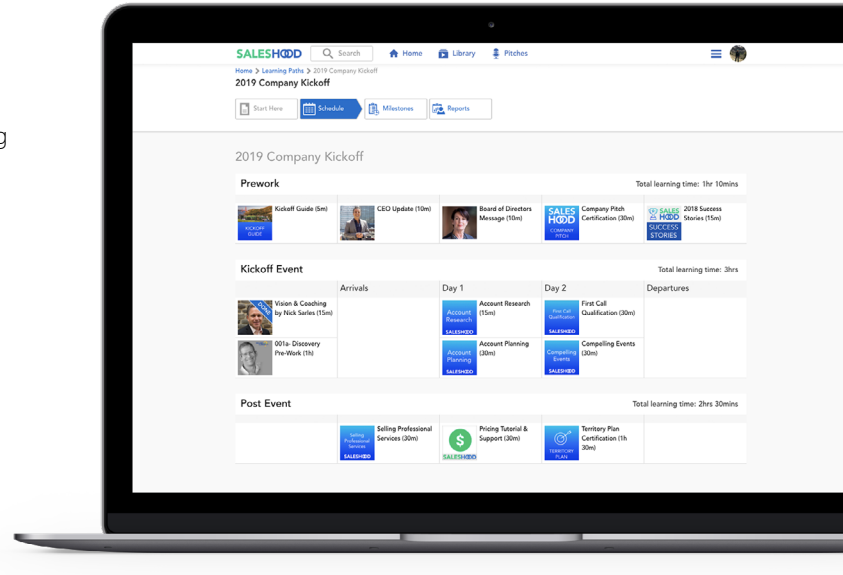
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Sales Kickoff Checklist

- 1. Share a kickoff vision with content publishers and event participants.
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- 2. Create a strategy that involves pre-work for attendees to complete before your event.
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- 3. Focus on inspiration, alignment, and motivation rather than product training.
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- 4. Celebrate customer stories, deal wins, and top performers.
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- 5. Schedule time to rehearse presenters and practice presentations before showtime.
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- 6. Avoid untested technology that leaves people with more frustration than benefit.
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- 7. Limit death by PowerPoint by encouraging active attendee engagement.
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- 8. Don't try to do too much. Make room for down time.
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- 9. Plan lots of networking and peer collaboration.
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- 10. Give reinforcement learning after the event to keep momentum going.
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- 11. Measure the impact.
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Best Practice in Action

Learning Paths in SalesHood are the perfect way to engage your teams before, during and after kickoff. Create custom paths by role and drive engagement using short videos on mobile. Social learning with feedback and peer reviews keeps it fun. And reporting means you can track completion as well as results of your testing and certification.



Takeaways

Kickoff events are an important part of company alignment. They energize and align teams by bringing people together in person or virtually. They are intended to be motivational and to support activities only possible to do together as a group. They are not intended to be a year's worth of training in one week or a few days. Be careful of trying to do too much in a single kickoff event.

Work with your leaders to create agendas that are mapped to your go-to-market goals and company priorities. Follow the tips and best practices in this ebook, and refer to the kickoff checklist before every event. Circulate it to planning teams to get everyone aligned with these proven best practices.



Learn More

FOR MORE BEST PRACTICES AROUND SALES KICKOFFS CHECK OUT THESE BLOGS



Sales Kickoff Agendas

Sales kickoffs serve a dual purpose: to celebrate the past year of success and to set the tone and goals for the new year.

[READ MORE](#)



Drive Great Engagement

There are guiding principles for sales content and communications that are attention grabbing, impactful and proven.

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Run a Successful Kickoff

Every year like clockwork, we look at each other and ask – How do we ensure this year's Global Field Kickoff...

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Learn about SalesHood

Our Sales Enablement Platform helps you achieve your priorities faster. You have a lot on your plate. We can help.





THANK YOU

THANK YOU FOR DOWNLOADING.

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ABOUT THE AUTHOR



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Elay Cohen is the CEO and co-founder of SalesHood. He is the former Senior Vice President of Sales Productivity at Salesforce. Elay was recognized as the "2011 Top Executive" and credited for creating and executing all of Salesforce's sales training programs that accelerated its growth from \$500M to a \$3B+ enterprise. The innovating sales training and support delivered over these years by Elay's team to thousands of sales professionals resulted in unprecedented hyper-growth. Elay authored the book SalesHood: How Winning Sales Managers Inspire Sales Teams To Succeed.