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Gartner for Sales

Increase the Long-Term Impact of Sales Kickoff Events

Build the ultimate agenda to put your sales team on the path to success.

Sales enablement leaders can extend the impact of sales kickoff meetings by planning activities that maximize learning application, inspiring sellers to meet company goals and encouraging sellers to leverage peer and expert connections to advance deals long after the event.

Overview

Key Challenges

- Since sales kickoff events typically happen just once a year, sales leaders and sales enablement leaders often overschedule their agendas, resulting in expensive events with questionable impact.
- Lengthy sessions culminate in long days that disengage attendees, who feel forced to sit through all the sessions. Attendees' disengagement leads to poor adoption of new best practices designed to help them succeed in the year ahead.

Recommendations

To improve the long-term impact of sales kickoff events, sales enablement leaders should:

- Develop pre- and post-event activities to effectively deliver pertinent information while reserving time in the actual event for impactful activities that will help sellers apply new information and strategies to their accounts.
- Feature seller and customer stories during the inspirational and motivational portions of the meeting to highlight relatable best practices attendees can emulate.
- Align sellers' interests with those of the organization by preparing a mission sheet that breaks down larger organizational goals into individual missions sellers can undertake in the months and quarters to come.
- Connect sellers with their peers on other teams through purposeful "crosspollination" and community activities to promote a collective knowledge that will last long after the event.

Introduction

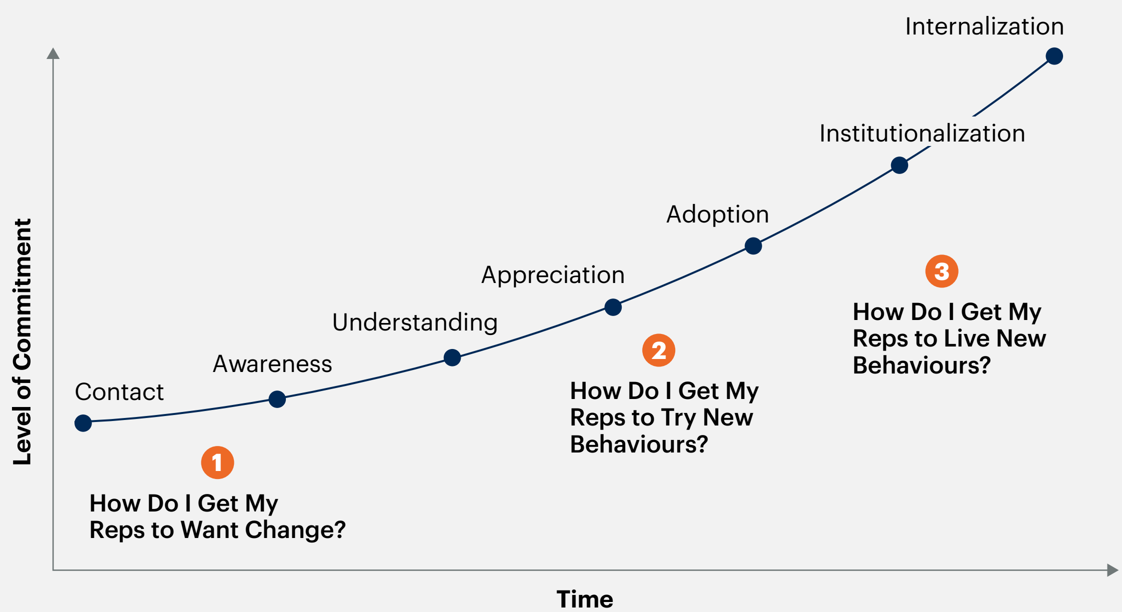
Sales kickoffs, or national sales meetings, are eagerly anticipated by sales teams. Sellers and managers appreciate the opportunity to step away from their normal routines to celebrate, plan and network. And sales leaders use the event to share insights from the previous year, highlight the path to success for the coming year and prepare their teams for what is to come.

Because these events happen just once a year, leaders throughout the organization want to use them to communicate with the entire sales team. Too often, the result is an overpacked agenda with more content and messages than can be effectively communicated. Despite the enormous amount of work put into the event, sellers can't absorb all the new information, and the delivery — because it neglects other communication channels — isn't optimized for their learning. Sellers' inability to absorb information hinders what they can apply when they return to their selling motions afterward.

Most sales kickoff events effectively increase sellers' awareness and understanding of desired behaviors. However, those are only the most basic steps in our behavior change adoption curve (see Figure 1). If the behaviors are instead institutionalized and internalized, sellers will return to their sales activities able to live the new behaviors they learned at the event. To do this requires winning hearts and minds and providing opportunities for practice.

Figure 1: Behavior Change Adoption Curve

Illustrative



Source: Adapted From Enterprise Solutions Competency Center; ODR, Inc.

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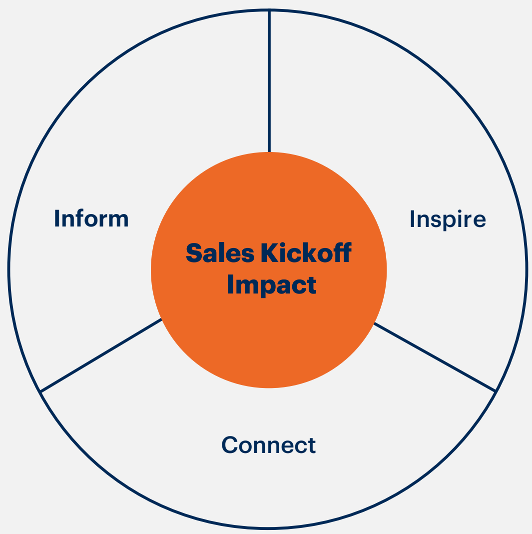
To accelerate the adoption of new behaviors and application of knowledge, sales enablement leaders should focus on enhancing the primary objectives of sales kickoff events (see Figure 2):

1. Sharing information
2. Inspiring success
3. Connecting sellers

Figure 2. Primary Objectives in Designing an Effective Sales Kickoff

Sales enablement leaders must develop pre- and post-event activities to allow more time for impactful kickoff activities.



- Kickoffs must feature sellers and customers in inspirational and motivational sessions.
- Leaders must break down larger organizational goals into individual missions the sellers can undertake.

Leaders must help sellers cross-pollinate to build collective knowledge.

Source: Gartner

Analysis

Develop Pre- and Post-Event Activities to Allow More Time for Impactful Kickoff Activities

Sales enablement leaders who balance the delivery of new information at sales kickoff with pre- and post-event activities are able to plan sales kickoff events streamlined to deliver information and best practices most effectively. By reserving time at the sales kickoff event for impactful learning and activities, sellers will apply new information and strategies to their accounts, helping to jump-start their selling year.

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Pre-Event Training

Since sellers will only remember a small part of the information shared in sales kickoff sessions, it is important to use multiple channels to deliver the information they need to succeed in the coming year. Sales enablement leaders should take a holistic look at the information that will be delivered at the kickoff. Which topics could be delivered via a mandatory webinar or e-learning module (with completion metrics carefully tracked)? Pre-event training is a great way to spark curiosity and excitement while delivering information that can be leveraged at kickoff.

Removing topics from the agenda that do not truly benefit from being shared in person frees up time for more impactful activities. Topics that could be delivered in other ways are often included in the agenda simply because they align with the timing of the event. Examples include:

- Product updates
- Sales process changes
- Competitive landscape briefings
- Updates from supporting functions (e.g., marketing, sales operations, finance)

The timing of pre-event training may seem challenging at first. Sales kickoff events typically take place at the start of the year, meaning the pre-event training would take place at the end of the year, a seller's busiest time. But organizations with low-effort sales training programs minimize this end-of-year impact by developing efficient 10- to 15-minute courses — four or five different topics covered in one hour. (To learn more about building low-effort sales training, see "Step 1 for Building a Low-Effort Sales Training Program: Establish a Sales Training Cadence.") In addition, the training can be done up until the sales kickoff begins, giving sellers perhaps a few days at the beginning of the new year.

Pre-event training should be available one month before the kickoff event. Managers should receive progress reports weekly, then daily in the final days before the event.

Impactful Kickoff Activities

Moving some topics to pre-event training makes room on the agenda for learning application activities where sellers can interactively reinforce what they learned from the prework and information-sharing sessions. For example, if sellers can learn about an upcoming product in their pre-event training, the time on the agenda might be better spent holding a Q&A session with the product team.

Learning application activities can be small-group exercises (table or easel-based) in a large conference hall or in breakout meeting rooms. Regardless of the location, having well-prepared facilitators is critical. Typically, facilitators are briefed on the exercises they will guide sellers through prior to kickoff, and they have a facilitator's guide to refer to in the moment. This prepares facilitators to effectively guide sellers through workshops, provide feedback on pitches or product demonstrations and lead account-focused exercises. Organizations that don't adequately prepare their facilitators often see more varied results.

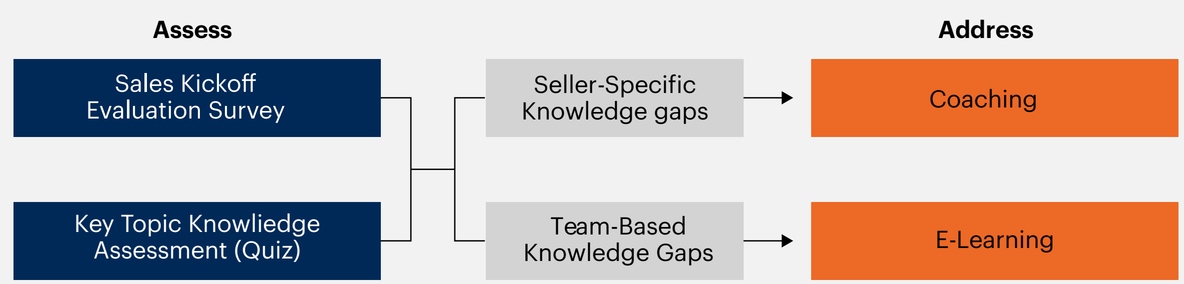
Sales enablement leaders should consider the timing of the activities in their event planning. Tired minds are slow to absorb new information. Skills development and other topics that require more executive functioning should be scheduled early in the agenda, while the audience is actively engaged and buzzing with the excitement of the event. Sellers' ability to focus on the first day of the kickoff is noticeably higher than on the last day, especially for those who traveled from different time zones. Topics covered later in the agenda often benefit from reinforcement through post-event activities.

Post-Event Activities

After the sales kickoff, sales enablement leaders should take steps to ensure sellers apply their newly acquired knowledge and skills to the new year's sales activities. Post-event assessments can help identify the most critical areas for reinforcement. Some organizations have sellers complete an evaluation form to determine their satisfaction with the kickoff, while others have stand-alone quizzes about the topics sellers were taught.

Once the areas that need reinforcement are identified, sales managers can provide prescriptive coaching, one of the most effective ways to improve seller performance, to address each seller's skills gap. [1] Or, for more wide-ranging knowledge gaps or topics that were given only a high-level introduction at the event, e-learning is an effective way to disseminate information (see Figure 3).

Figure 3: Methods for Assessing and Addressing Knowledge Gaps After Sales Kickoff



Source: Gartner

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Many sales kickoff meetings are the venue for presenting big ideas or multiquarter initiatives. One best practice for keeping the sales team focused on these big ideas is to communicate updates regularly. Updates help sellers see that leaders are following up and remind sellers to continue applying their new knowledge and skills to client activities, as noted in their mission sheets (a seller-created list of specific actions to take after kickoff).

Ideally, sales leaders will deliver updates in a dedicated monthly call with sellers, sharing the progress made, the results seen and next steps. However, many companies find a way to weave these updates into existing communication channels, such as newsletters and regularly scheduled global team calls. Providing sales managers with slides to share during their team meetings also helps keep the message consistent and shows sellers that larger organizational goals are important locally, too.

Feature Sellers and Customers in Inspirational and Motivational Sessions

Most sales kickoff meetings have a brief review of the past year to highlight key successes and a few lessons learned. However, the focus on the future is where sales teams get inspired. Seeing sales leaders share their plans on stage instills confidence and excitement.

Recognizing the company's top sellers is common at sales kickoffs to express appreciation for their contributions and inspire others by showing them what's possible. However, many organizations miss the opportunity to showcase the best practices and behaviors that put these sellers in a position to be celebrated. Our research shows 69% of employees regularly seek new ways of doing their work from their co-workers. [2]

Sales leaders can incorporate a best practice from each top seller in a variety of ways. For example, the seller's manager could briefly interview the seller in a prerecorded video, or the seller could explain the best practice on stage in a five-minute discussion before a session. Peer-to-peer socialization of change, where sellers share their practical, proven tactics, improves the application and learning of new behaviors by 14%.[2]

Including customers in the sales kickoff event is another way to motivate sellers. It is a huge ego boost for a seller to have one of their customers selected to deliver a message to their peers. When done well, these customer profile sessions are extremely memorable for the audience. They put featured customers in a position where they can tell stories that validate the value proposition of their purchased solution. In addition, they serve as a model for sellers in learning more about their own customers.

Balancing customers' messages with how the solution drives value in their own organization will help sellers develop customer stories to share with their prospects. However, a thorough discussion of the customer's buying process may be even more valuable in helping sellers better understand their own prospects and customers. Some questions to ask in a customer interview that will facilitate this understanding are:

- What was the challenge that initiated your purchase? (Why? And why now?)
- What sort of research did you do before making your purchase decision?
- What was the approval process like?
- What behaviors or tactics from the rep were most helpful?
- What behaviors or tactics from the rep (or the competition) made the decision more confusing?
- What key aspects of the solution stood out as superior?

To make the learning from sellers and customers more lasting, turn these stories into case studies that will reside on your sales content management or e-learning platform. That way, sellers can access them to refresh their knowledge, and new hires can access them as part of their onboarding training.

Break Down Larger Organizational Goals Into Individual Missions for Sellers

When sellers listen to company leaders and sales executives plan for the coming year, they are energized and excited by the prospects ahead. With a well-designed agenda, the same can be said for all sessions. But what will sellers take away from each day? What behavior changes will take place because of something said in a session on Day 2 at a sales kickoff?

When sellers are guided to develop a mission sheet containing the key take-aways from each day at a sales kickoff, it becomes much easier for them to carry the learning back to their selling activities. A mission sheet is a tool where they can document the missions (or specific actions) they will execute after the event and throughout the year in order to help the company succeed.

A mission sheet has two parts:

- The first part lists the big take-aways from the day's most important sessions. If the team is in all the same sessions for the day, the stated goals can be prepopulated. If the team is attending breakout sessions, each breakout session should state its key take-away and have the sellers add it to their mission sheets.
- The second part is where sellers document their specific missions, which should align with the stated goals from each session. These actions should be very detailed, with customer names, dates and any specific resources called out.

Near the end of each day, or at the start of the following day, the agenda should have 10 to 15 minutes allocated for sellers to complete their mission sheets. Sales managers should review and revise the mission sheets within a week of the sales kickoff's conclusion. Sales managers and sellers then monitor progress against the mission sheets as part of their ongoing forecast review meetings. Sales managers can highlight the completion of sellers' missions at team meetings to show continued progress on the team's contributions to company goals.

Table 1: Mission Sheet Example

Sales Kickoff Day 1	
Stated Goals From Key Sessions	**Missions to Execute**
Goals From "Next Year's Sales Plan" Session • Achieve revenue target. • Exceed margin target. • Drive X% of business through channel partners.	1. 2. 3.
Goal From Product Launch • Address the new market, and drive $X revenue by 3Q.	1. 2. 3.
Goal From Hospitality Industry Roundtable • Tailor our go-to-market message for three new personas.	1. 2. 3.

Source: Gartner

Help Sellers Cross-Pollinate to Build Collective Knowledge

One of the most exciting parts of a sales kickoff event is that all the sellers gather in one physical location. It's tempting for sellers to stick with the peers they know well or work with regularly, but smart sales enablement leaders mix up the groups to promote more diverse knowledge sharing that will last long after the kickoff event.

Assigned seating is one way to encourage cross-mingling, especially when the sessions include table-based exercises. With a national or international audience, seating plans that integrate people of various tenures, roles, locations and more can result in more creative discussions as a result of the diverse perspectives. For example, some exercises may benefit from having veteran sellers share some best practices with the less-experienced sellers at their tables. And less-experienced sellers may be able to share some unconventional strategies or question some of the veterans' "tried and true" procedures.

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On the other hand, in some cases, grouping sellers by similarities generates great collective knowledge. These “birds of a feather” sessions can result in productive, deepdive discussions about topics such as industry or certain product groups. Birds of a feather sessions can simply be table discussions as part of a larger session, or they can comprise an entire agenda track with sessions in which sellers collaborate and consume deep-dive information specific to their areas of expertise. Or, more informally, specific tables during meals can have subject matter experts hosting discussions on their areas of expertise. One common outcome of these expert-level discussions is the discovery of new best practices.

To continue the productivity of these knowledge-sharing groups after the kickoff, sales leaders can set up an online community in which sellers can continue their discussions, post questions, share best practices and showcase customer examples. Another effective way to spread knowledge is to ensure experts have an opportunity to share some of their key take-aways with their regional teams, either at the kickoff event or shortly after.

Conclusion

Investment in a sales kickoff meeting will pay dividends when sales enablement leaders align activities and engagement with the planned learning. The sessions should be designed to prioritize impactful activities that help sellers apply new information and deliver best practices and insights from sellers and customers. In addition, aligning sellers' missions with corporate goals and enabling collaboration throughout the organization will create a lasting impact that changes behavior and puts the sales team on the right path to a successful year.

Notes

[1] 2016-2019 Gartner Frontline Sales Leadership Diagnostic

[2] 2016 Gartner L&D Digital Learner Survey

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