



2018 Guide to **Sales Kickoff Planning**

Learn What to Do (and What Not to Do) for a Successful SKO

According to CSO Insights, companies with solid sales enablement plans in place enjoy **8.2% higher revenues** than those companies that don't.



CHAPTER 1

Start 2018 Strong with an Impactful Sales Kickoff

For many companies, a sales enablement plan may well represent the difference between reaching business goals and falling short. For sales managers and representatives, it can mean quota, commissions and bonuses.

Successful sales enablement involves a number of elements. Of these, the sales kickoff (SKO) belongs at the top.

Sitting right at the beginning of Q1, a great SKO can lead to strong Q1 performance and set the pace for the year. Like anything, though, a successful SKO requires preparation, planning and follow-up. This guide provides ideas and strategies to plan and execute a successful SKO and give your business a strong start in 2018.

Inside this guide, you will learn:

- How the role of SKO continues to evolve with a changing sales landscape
- All SKO aspects sales leaders must include when planning
- How to craft an agenda that engages and maximizes the available time
- Why post-SKO follow-up is essential and how to do it effectively

At the end, we've included a bonus: LearnCore's planning checklist will walk you through each step of the process. With it, you can plan and execute a powerful SKO so you can get 2018 off to a fast start.

CHAPTER 2

The Evolving Role of Sales Kickoff

The importance of SKO continues to grow as the customer sales journey evolves. Traditionally, a sales funnel featured leads that entered at the top and either qualified themselves out or closed. Today, with abundant online content and other technologies, buyers can enter and leave the sales funnel through various on- and off-ramps. Buyers also have access to more information—and often more options—than ever before.

This evolving landscape demands that sales leaders adapt their approach. While some elements of sales remain fixed, how sales leaders engage and communicate with their teams has changed. For example, while many companies continue to have traditional on-site SKOs to kickoff the year, others have begun to do virtual SKOs. Just as it sounds, a virtual SKO brings the team and presenters together virtually through technologies that enable audience participation.

Tools that enable virtual SKOs also empower sales reps to maximize the impact of their presence in front of a customer, both when they are physically there, and when they are not. With the customer-side of the sales landscape changing as buyers become more informed and knowledgeable, sales leaders and marketing teams can provide their sales teams abundant content to aid in the sales process. This is a big reason why we're seeing the growth in the use of sales enablement strategies and technologies.



A strong sales enablement effort delivers training, valuable marketing content, coaching and useful competitive information. Together, these provide sales reps the tools they need to communicate clearly and, most importantly, sell. This effort begins with a powerful SKO.

7 Sales-Building Efforts Accomplished by an SKO

Through an SKO, companies and sales leaders accomplish 7 important sales-building efforts for the year. An SKO can:

- 1 Set the vision and tone for the year
- 2 Establish sales goals and explain the rationale behind them
- 3 Engage the sales force through knowledge-sharing
- 4 Disseminate new information and ideas on products and sales strategies
- 5 Encourage face-to-face team-building
- 6 Reward the sales force for last year's effort
- 7 Build excitement for the new year

Of course, if the event falls flat, it won't achieve these goals, create enthusiasm or encourage the sales team to use the tools created and presented during SKO. This makes preparation and planning essential to create a memorable and ultimately successful event.

CHAPTER 3

SKO Preparation: High-Level Goals to the Nitty-Gritty Details

A successful SKO depends on planning. The plan should include four parts. Each of these components are essential for the event to generate an ROI on the money and time invested to make it happen and to act as a spring-board for the year. That goes for multi-day trips to hotels and single-day events held at a local convention center alike. The four parts are:

1. Event goals
2. ROI and budgeting
3. Themes
4. Sales enablement efforts
(i.e., pre-SKO assignments)

A great SKO blends these components into a seamless event. It also sets the expectation for post-event activity. Each must be clearly detailed and planned to ensure the maximum impact on the sales force and company revenue targets.

Let's look at planning each part of a successful SKO:

1. Event Goals

SKOs should align the sales force within the broader business goals for the year. This makes the first and primary goal for the event simple: communicate the company goals and include a clear explanation of how sales is integral to its success, and how it benefits them. All subsequent goals flow from this one.

Secondary goals can generally be grouped into one of three categories:

- Engagement
- Education
- Excitement



Ideally, goals should be set in each of these three categories for both sales leadership and the sales force for activities before, during and after the event. When it comes to goal-setting, follow a few simple rules to ensure success:

- Every session, presentation and SKO event should reinforce the overall goals and message of SKO.
- Keep additional goals to a minimum. If you try to accomplish too much, you may end up accomplishing very little.
- Use the S.M.A.R.T. approach to goal-setting. Each goal should be:

Specific

Measurable

Attainable

Realistic

Timely

2. ROI & Budgeting

Whether you're going to Vegas or down the block, every SKO has a cost. Some estimates place the average SKO cost at \$1k-2k per sales rep. And that doesn't include taking them out of the field, another element that incurs an opportunity cost.

Like any investment, the budget per rep should be tracked and measured to evaluate the event's success. While budget could be measured against overall company success, budget by rep digs deeper and can identify specific areas for improvement.

A budget should include obvious factors such as venue cost, room and board if applicable, and travel expenses. If you will bring in an outside speaker, that cost should be figured into the equation as well. Finally,

sales enablement technologies should be accounted for, too.

Of course, ROI doesn't always have to be revenue. Other measures could be profit, closing percentage or even retention.

However you choose to measure ROI, make a point to do so. It will tell you what worked and what didn't. It also will inform SKO planning for the following year.

3. Themes

A theme makes a message memorable. Done well, it focuses attention and creates excitement. When it comes time to choose a theme, the best ones are those that align with company direction and goals. They can be fun, but should remain relevant and reinforce the message of the SKO.

Do you need a sales enablement technology for SKO? It helps.

Mobile apps and other sales technologies enable leaders to push out presentations to reps, and ensure your team can communicate and sell effectively. The information gathered from these can be run against sales revenue later on to determine ROI.

4. Sales Enablement

The most successful meetings happen when everyone is prepared and feels that they are contributing to the effort. Pre-SKO assignments prepare the sales force for the event. It also offers sales leadership an opportunity to obtain vital feedback and design an agenda to deliver the maximum impact.

It should be noted that no sales force wants to do extra work. To inspire response and engagement, sales leadership can offer incentives and spiffs for completion of pre-SKO work or gamify the effort. Alternatively, leadership can dangle the carrot of the new year's incentives and comp plan. Put the

prep work in the same folder and measure views to understand engagement, or where further encouragement may be needed.

Pre-work not only prepares the sales force for the event, but it also builds excitement and lays the foundation for the message.

Pre-work can include:

- Sales team surveys
- Watching videos that communicate event messages and build excitement
- Online certifications



A Final Thought on SKO Preparation

Start high-level with goals. Build a theme that aligns with those goals. Then, determine the engagement model that will produce the best results. From there, build out the budget and identify the metrics by which you will measure ROI for the SKO investment.

CHAPTER 4

The SKO Agenda: A Vital Factor to Make a Successful Meeting

The meeting agenda can make or break an event. It can make it by delivering a powerful, cohesive message that inspires the sales force as it brings together the goals, themes, activities and all the pre-work. Or, it can fizzle when elements don't quite fit or the message becomes confused.

Essential Elements of an SKO Agenda

Strong SKOs all share common elements. These include:

Review of sales. The head of sales presents last year's results, shares successes and discusses challenges encountered as well as goals for the new year.

Company direction. The CEO or President delivers a company "State of the Union" speech that covers overall company successes, the vision for the future and key changes in the industry.

Marketing updates. The head of marketing reviews new marketing programs for the year, market positioning and strategies to engage with sales on topics such as lead generation, customer feedback and other initiatives being rolled out.



If other department heads cannot attend SKO, ask them to record a short video with their updates so they can still be included and sales reps are informed.

Department updates. The sales force relies on customer service, shipping, accounting and, well, everyone. Department heads should do short presentations to share news, process updates and establish rapport and a sense of cooperation to start the year.

Product review. In this session, changes and enhancements to the current product line are presented, new products introduced (but not launched—see page 10) and R&D for future products shared, as appropriate.

Competitive review. This session reviews the comparable weaknesses and strengths of top competitive products, and any key announcements from competitors.

Social time. Make sure to include time for people to socialize and share and learn from their peers. Try to include a minimum of two of these: a cocktail hour, sit-down dinner, luncheon, or pre-meeting breakfast.

Sales-focused sessions. These sessions should focus on the sales cycle, customer presentations, success stories and other sales-specific elements. The more hands-on these sessions, the better.

Guest keynote speaker. A guest speaker offers perspective and validates the company message. It's important when looking at a guest speaker to choose carefully, as their presentation should fit neatly with the company message.

Call to action. This short presentation sits at the end of the event. It should review the key takeaways from the meeting, reinforce the message and deliver an actionable task the sales force can apply when they return to the field.



Keys to a Powerful SKO Agenda

There are many ways to structure the SKO agenda to include all the elements listed above. For the maximum impact, here are a few keys to building them to deliver a powerful message.

Start high-level. Review sales, company direction and marketing updates early. The keynote speaker can then conclude to add cohesion and unify the message.

Have an emcee. An emcee keeps the meeting moving, reviews agendas and can deliver important information like when and where events will take place.

Finish the event with sales-focused sessions and activities. This keeps the sales force focused and offers tools to execute the goals laid out at the beginning.

End sessions with a social hour. It could be lunch, a cocktail hour at the end of the day or even a snack bar in-between sessions. You can also build a short, 5-minute social period into the beginning of every session so people can get to know those around them.

What Not to Include in an SKO

Generally speaking, some things simply don't belong at an SKO—PowerPoint, for example. Yes, a few slides to display results may be appropriate, but remember, the audience is the sales force.

Sales people like to move. They like to interact with people. They often learn by doing and that should be considered when developing sessions.

Product launches also should be avoided. Why? A product launch requires too large of an information download and may kill the excitement of the event. Of course, there are exceptions. For example, if a new product aligns with the company direction and means a new target customer the entire sales force needs to know, a high-level product launch may be appropriate and even serve as a source of excitement.

To keep messaging clear and consistent, make sure all speakers (yes, even the C-levels) “stick to the script.” This also means that the message of a guest speaker should sync and reinforce the company message for the year.

CHAPTER 5

Post-SKO Follow-Up

Your SKO ended to wild applause and cheering. The sales force left pumped up and ready to sell. Then, life happens. There's the flight back, the car ride home and well, everything else that can sap the enthusiasm created by SKO.

This is reality. And it's why post-SKO follow-up is essential if a company wants to ensure the time and money invested leads to an ROI. In fact, SKO follow-up and sales enablement efforts linked to the SKO may be the most important aspect of the effort.

Learning and Retention Happen in the Follow-Up

In 1885, German psychologist Herman Ebbinghaus proposed the "forgetting curve." With no effort made to retain memory, nearly 70% of new information is lost in the first 24 hours. This figure corresponds neatly with a report from the Sales Executive Council that found sales representatives forget up to 87% of the training and content they received after just one month.

Fortunately, today's technology makes it possible to reinforce the content presented during SKO. Once SKO has ended, all sales reps should have easy access to materials presented during the event. Sales leaders can also create post-SKO assignments to further retention, encourage engagement following the event and keep the learning going. For example, sales reps could record themselves discussing three key take-aways from SKO or their Q1 action plan based on the goals established at SKO.

To employ these sales enablement strategies, sales leaders and marketers can leverage their intranet or, better yet, sales training solutions like LearnCore to deliver:

- Presentation decks
- Brochures
- Training guides
- Product manuals
- Video training
- and more



Post-SKO assignments transform coaching into a bi-directional engagement that requires sales reps to take ownership of the material.

Another good way to reinforce the company message and enthusiasm of the event is through photos. Photos or even video taken at the event can help prompt memory and help attendees remember the positive energy created by the event.

After-event work, delivered and tracked by technology, can help monitor and measure responses, giving sales leadership feedback on what resonated and what didn't.

Plan the Follow-Up

When planning SKO, make sure to plan follow-up materials and activities in the hours and days following the event. By making follow-up a key part of SKO, a larger percentage of the sales force will remember the message, content and excitement of the event as they plunge into a new year of sales!

Conclusion

SKO is the most important sales meeting of the year. For maximum effect, make it the kickoff to your company's sales enablement plan for the year, too. It offers an excellent platform to establish the plan, gain buy-in and engage sales to identify and provide the best content and tools to promote sales success in alignment with company goals.

After SKO ends and everyone has gone home, retention and continued enthusiasm will rely on a constant engagement with the sales force. For sales people, this means ease of access. Today, the easiest way to reach an active and mobile sales force is through sales training solutions.

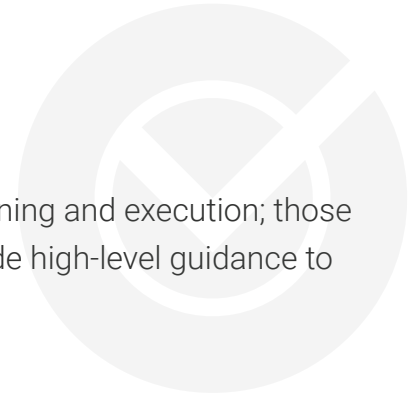
As you plan your 2018 SKO, include a review of sales engagement with the tools and materials produced to support them. Some questions to consider may include:

- What is the sales engagement rate with the available tools?
- What is the sales feedback on the tools and materials provided?
- What do the sales reps say would help them most?

If you want to identify questions specific to your company's unique need, LearnCore's team of sales enablement experts can help. Please contact LearnCore for more information. Together, we can make 2018 a blockbuster year!

SKO Planning Checklist

This checklist isn't meant to define a task for each detail of SKO planning and execution; those will vary from one company to another. Rather, it is intended to provide high-level guidance to help you build a solid foundation for a successful SKO.



- ☐ Select a date and time for the event.

- ☐ Define a message and choose an event theme, if desired.

- ☐ Book the venue.

- ☐ Arrange for lodging and travel, if applicable.

- ☐ Plan for the necessary equipment/technology for presentations, activities, etc.

- ☐ Arrange for meals and refreshments at the venue.

- ☐ Plan and arrange event décor and themed/branded items, such as banners, signs, etc.

- ☐ Decide who will be speaking at the event, and on what topics.

- ☐ Select an emcee/overseer of the event.

- ☐ Create a schedule of sessions and times.

- ☐ Distribute invitations/marketing content, such as emails and flyers, to sales people.

- ☐ Plan social activities and/or games.

- ☐ Plan post-event activities/reinforcement, such as surveys, meetings, etc.
