

Sales Kickoff Planning Checklist



Average spend on SKO: \$3,000 per rep (Sales Benchmark Index, 2017).

With about 200 selling days per year and quotas set anywhere from \$1-4 million, an account manager can be responsible for \$12.5k revenue each selling day (Kym Wood, Director, Field Enablement).

5-6 Months Before

- Set the budget with stakeholders.
- Choose location, dates, and length of event.
- Estimate number of attendees.

Tip

Be inclusive: When you have a limited budget, consider making part of the event virtual instead of cutting sales development or sales engineers from the guest list.

4 Months Before

- Dig up surveys from last year's event, if you have them.
- Identify a stakeholders' shortlist of three things sellers should walk away with.
- Pair each behavioral change with a key metric to measure success.

Tip

Treat your stakeholders like you would treat a buyer: Ask what has changed since last year, what problem you should be trying to solve or avoid, and discuss how you'll know you achieved a good outcome.

3 Months Before

- Conduct a survey to sellers about what they would like to see at the SKO.
- Interview a few of them.
- Design the agenda, creating a diversity of sessions using categories like:
Purpose: Knowledge or Process / Skills / Motivation or Fun
Format: Absorbing / Practicing / Networking
Audience: By Product / By Role / By Region

Tip

Prioritize retention: Keep all sessions to 45 minutes or less, leave plenty of time for meals and breaks, and don't extend any heavy programming outside of the 9 a.m.-5 p.m. window.

2 Months Before

- Recruit sales leaders, coaches, trainers, and outside consultants to run sessions.
- Collect session titles, abstracts, and any activities the attendees will participate in.
- Recruit customers who can attend and share their experiences.
- Pressure test the agenda for language and cultural considerations, attendee energy levels, and diversity of topics.

Tip

Test ideas with focus groups before finalizing them: Make sure activities intended to be "fun" won't backfire by putting people in an uncomfortable situation or unintentionally excluding anyone.

1 Month Before

- Produce some hype videos to get people excited.
- Assign prework that will carry through to specific sessions.
- Share the agenda and other information so people know where to be and when.

Tip

Flip the classroom: Distribute knowledge pre-SKO and practice the new learning on-site. If you don't have an LMS, short videos will get the job done.

During and After the SKO

- Capture fun moments and sound bites for social media.
- Collect reinforcement materials and resources and make them accessible.
- Send a follow-up survey within one week of the event.
- Create a reinforcement plan for the two to three months following the SKO.
- Meet with frontline managers to gain their commitment to reinforcement.
- Report back to stakeholders on metrics 30, 60, and 90 days after the kickoff.

Tip

Create a well-rounded reinforcement plan: Identify what goes in the LMS, what frontline managers should reinforce, and what coaches or trainers can cover in special sessions post-SKO.