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The 6 Vital Signs for Sales Kickoff Success

By Janet Gregory

Time for sales kickoff. Ready. Set. Go.

1. Pick a location.
2. Invite some people.
3. Have some fun.
4. Conduct a little business … training & business updates.
5. Recognize last year's top performers.
6. Done! Whew! Let's get on with the new sales year.

STOP. Sound effects – ***SCREECHING TIRES***.

NO

That is just not sufficient to make your sales kickoff a success.

Sales kickoff is a critical element in the success of your business and sales strategy. If it is not being used in that way, it should be. Sales kickoff is the launching pad to communicating the business strategy for the new fiscal year. Kickoff is the driver for sales approach, customer relationship planning and new products that will accelerate your business in the year ahead.

If the six vital signs for sales kickoff are strong, you'll be off to a high velocity year ahead and fast-tracked in the right direction. If the vital signs are weak or flat-lined, be prepared for a bumpy ride.

***Vital Sign 1:* Objective setting.** Develop a shared and agreed-upon set of objectives for the sales kickoff. Sounds easy, but this is a complex task. There are many stakeholders that need to be aligned, from the executive staff to marketing to sales to engineering and administration.

- *Goal post.* Sales division and geographic theater objectives need to fully support company goals. Sales kickoff sets the stage for meeting and exceeding company goals. It strengthens support, teamwork and enthusiasm for achieving these goals. The goal post is key to defining a successful outcome for sales kickoff and for the year ahead.
- *Windshield or rearview mirror*. Is sales kickoff primarily focused on recognition and reward for performance in the last fiscal year? Or is the primary concentration on the new fiscal year ahead? Often it is a mix. The windshield or rearview mirror determines who will be invited to attend sales kickoff.
- *Action heroes*. What behavior needs to be reinforced and what needs to be changed. Identify and recognize action heroes from last fiscal year's success but add a new twist! The new twist is

to reward action heroes with behavior that is consistent with the new skills and approach needed in the new fiscal year. If you like the idea of action heroes read more about it in the article "Four Ways to Simplify Sales." Recognizing action heroes in a way that promotes and reinforces desired behavior is a powerful double play.

***Vital Sign 2:* Agenda formation.** Create an exciting, interesting and interactive agenda. Make it so that they hurry to the next session and don't linger by the coffee pot so they won't want to miss anything.

- *Track design*. One-size-does-NOT-fit-all in sales kickoff meetings. There will be sales specialists attending; make sure that sales kickoff strengthens their specific skills. Sales specialization will be unique to your organization … pre-, post-, relationship, renewal, services, technical, channel, direct, inside sales and others. Design tracks or breakout sessions to "go deep" for each of your specialists.
- *Qualifiers*. What's in and what's out. If it doesn't qualify against the goal post take it off the agenda. It doesn't mean that non-qualifiers are not important; just find another venue for delivery. If it is a fundamental, make it a pre-requisite and don't use valuable kickoff time. Qualify all content to be consistent with kickoff goals and objectives.

***Vital Sign 3:* Event planning & management.** Integrated design and planning is the difference between a good sales kickoff and a phenomenal event that people talk about ALL year.

- *Venue*. Select a site that fits your budget, the size of the group and the culture of your company. Early selection provides the best choices and prices. Assess ease of flow between general sessions and tracks. Look for ample room to allow for collaboration and ad-hoc meetings between sessions. Gauge the level of experienced on-site support available to handle the group and all associated activities. The right venue ensures a smooth event.
- *Personality factors*. Company personality is reflected by the site selection, preparation and on-site support. As you evaluate locations assess how they reflect on your company personality … action orientation, formality, novelty, organization, sociability and discipline. Site personality factors set the tone for your kickoff (or confuse it).
- *Staging*. Entertainment, activities and guest speakers should align with sales kickoff goals and objectives. They can be competitive, motivational, educational, team-oriented, or they can reinforce whatever goals you have. As an example, if teamwork is a goal, then activities might

include a golf scramble, a motivational speaker might be a pro ball player, and learning might be accomplished with more workshop activities. Stage the event to reinforce your goals.

Vital Sign 4: ***Content development.*** This is the star of the show. Make them want to put away their iPhones, Blackberries or Androids because they don't want to miss a minute of the action.

- *Compact, full-size or luxury.* The difference is price, preparation and presentation. Establish module guidelines, templates and approach. Every module owner should know the objectives of their module and how it contributes to achieving the goals of kickoff and improving sales performance. This is not about budget but the quality of the experience; make it a full-size or luxury experience, even on a compact budget. Draft reviews, coaching, practice sessions and dry runs help serve up an outstanding result.
- *Dare to be different*. Approach things differently. Mix it up. Please, no more death by PowerPoint! Hungry for more, you might also want to check out the article "Killer Sales Kickoff Meetings." Vary the approach to content delivery with workshops, games, panels, role plays, interviews, competitions, talk shows and group activities. Revolutionize your sales kickoff.

Vital Sign 5: ***Project management.*** Managing a sales kickoff requires all the key disciplines of project management: planning, organizing, controlling resources and driving deadlines. A project manager ensures that you are ready when the checkered flag drops.

- *From time trials to racing legend*. In the early planning stages it's engine warm-up and trial runs with lots of improvising, excitement and experimenting. Then the design gets committed to action and the project plan takes shape. Assign a project manager to attend to every detail. Ensure that all presenters are prepared and modules are fine tuned for results, just as a team manager attends to every race detail.
- *Stopwatch*. Click. Timing is everything. Seconds matter. Establish and maintain a fierce attention to timing in planning and preparation for sales kickoff. Evaluate performance with regular weekly project review meetings. Track ownership, publish deadlines and follow up on progress.
- *Art & science.* Corralling executives is both an art and a science. Assign "ghost writers" to develop presentation and performance material for executives. Executives are busy and it is far easier for them to edit, than to create. Build in flexibility to work in and around their schedules, to brief them, help them prepare, and to dry run their presentations. Based on venue, teleprompters are a valuable asset for executives, especially for key note presentations.

Vital Sign 6: ***Internal marketing.*** The saying goes that "the cobbler's kids have no shoes." It's true when it comes to internal marketing; as companies we forget to sell ourselves *to* ourselves.

- *Make it shine*. Yes, sales kickoff is on everyone's calendar. But, it's more than a typical business meeting. Polish up the star and make it shine. Advertise it. Build excitement and anticipation. Get people talking about it. Send out teasers. Make them look forward to sales kickoff.
- *Design*. Style is important to everything from clothing to car, it should be important to your kickoff meeting as well. Select a theme. Design a logo. Craft a tag line. Create templates for presentation materials. Tie the theme into sales kickoff goals, activities, entertainment and guest speakers. Set up an intranet site for pre- and post-kickoff materials. Coordinate giveaways, staging and on-site signage to the theme. Design in some style, give your meeting an identity, a persona, a personality.
- *My favorite*. We all have had a favorite set of wheels. Let's have this year's sales kickoff become that favorite. Sales kickoff is not an event; it is the launching point for the year. Treat it like a product launch and build the on-going strategy to ensure that the "customers" are buying and sales behavior is changing. Plan reinforcement activities in the geographic theater or division, or

at the local office. Look for action heroes that get out of the blocks quickly. Create an integrated campaign approach to drive action and adoption throughout the sales year.

Yes, pick a location, have some fun and conduct business but sales kickoff is much more than that. There might be five steps, fifteen steps of fifty steps to your successful sales kickoff but there will be always be these six vital signs. Ladies and gentlemen start your engines.

Wishing you an amazing sales kickoff.

Janet Gregory is a veteran sales executive and co-founder of KickStart Alliance. For assistance with sales strategy, sales planning, training, sales enablement, compensation or any aspect of sales operations, contact Janet. Janet leads the sales readiness practice at KickStart Alliance. For help in aligning sales & marketing for results contact any member of the KickStart Alliance team.