Virtual Sales Kickoffs:

10 Steps for a Successful Remote Event

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Introduction

Many organizations with sales kickoff (SKO) meetings in early and mid-2021 face the need to reshape their meetings as virtual events. Impelled by the pandemic, they're looking at how to best impart knowledge, set the tone for the upcoming year and radiate enthusiasm in an online-only realm.

SKOs bring a variety of benefits — serving as a means to inform and rally the "troops," set a foundation for success, and act as a catalyst for improvements throughout the year. These outcomes can happen, too, in a virtual environment. With careful planning, a flexible mindset and cross-functional collaboration, you can plan a different — but still highly effective — kickoff. This eBook will review 10 key steps to making your virtual SKO a real success.
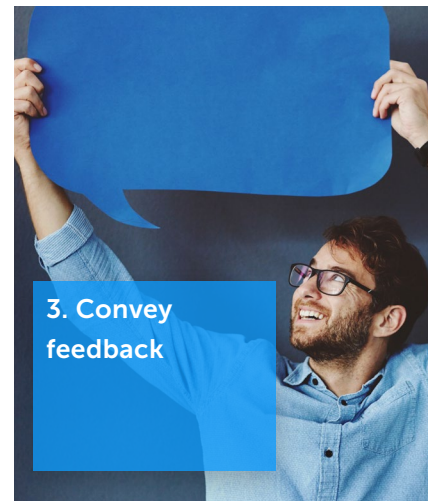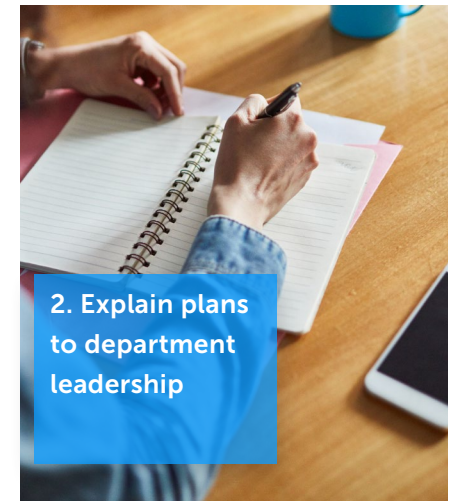
1.
Form your planning committee

Just as with physical events, virtual ones require careful planning. Consider who will lead and participate in that planning.

Sales enablement often takes this role, given its pulse and perspective on sales' needs. In fact, **data shows** that among companies with sales enablement functions, in nearly 8 out 10 cases (79%), the sales enablement department supports SKO planning and execution.
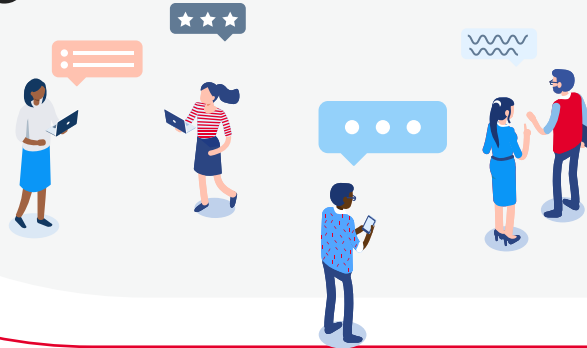
But planning can't be accomplished in a vacuum and requires cross-functional collaboration. In addition to sales enablement, **planning committee members typically include representatives from sales, customer success, marketing (including event coordinators) and product management departments.** When planning a large-scale virtual event, it's also often important to include IT.

The core planning committee typically meets weekly or bi-weekly, with responsibilities including:

1. Inform and secure buy-in from executive leadership

2. Explain plans to department leadership

3. Convey feedback

4. Draft, review and tweak SKO plans and agendas

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2.
Consider your kickoff audience

Your sales kickoff is, of course, greatly beneficial to the sales organization. But oftentimes, there are other teams that get value from participating.
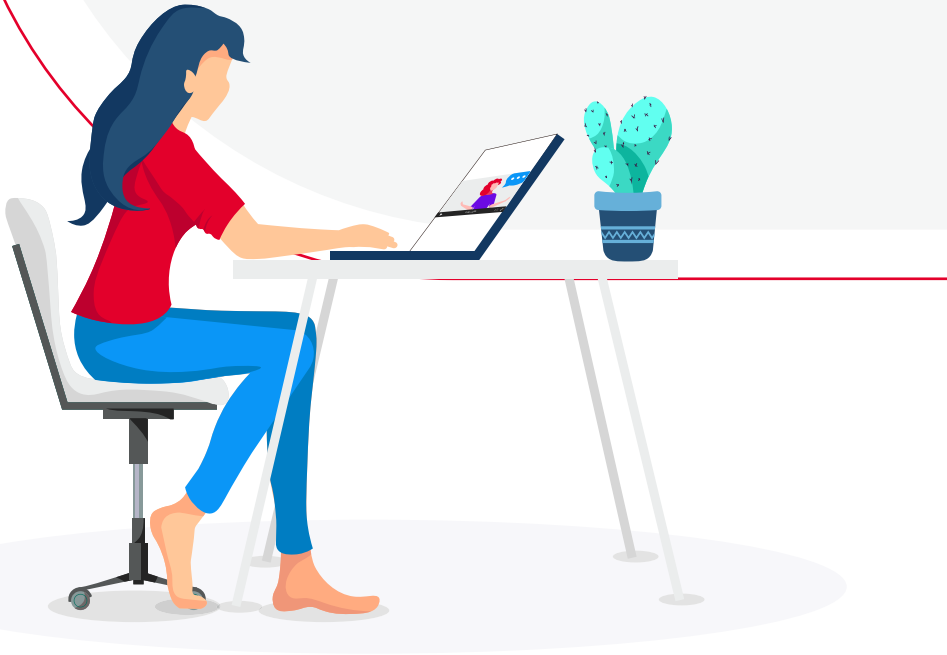
Who else should you include? **Consider groups tasked with increasing customer satisfaction and retention – such as customer experience/ success, professional services and implementation (or delivery).** It's important that they're on the same page as the sales team – well-versed in your company's strategy and direction, and able to deliver a consistent message to customers. There may be other functions worth including too, that directly impact your organization's strategic goals and initiatives.

In the past, budgetary concerns (such as travel fees, food and beverage tabs, venue costs, etc.) might have precluded having a more extensive audience. But there's likely more flexibility now due to the elimination of those expenses.

In a virtual setting, your event can be hosted at a much lower cost, while including a larger, still-relevant audience. As you plan, be sure to segment event messaging to the various groups attending so they get the most out of it.

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3.
Set objectives

When setting objectives, focus on what you can feasibly accomplish. Historically, **SKO goals include getting teams revved up for the year ahead, celebrating outstanding individual and company successes, and giving reps information that will help them improve their performance.**

Your objectives, for example, might include:

- ✓ **Motivate the teams**
- ✓ **Celebrate success**
- ✓ **Conduct skills development**
- ✓ **Launch a new product or service**
- ✓ **Introduce a new methodology**

Before setting anything in stone, review objectives with your executive leadership so everyone is aligned.

Once you've defined your audience, it's time to set kickoff objectives. Your objectives for a virtual SKO might be the same as, or similar to, ones you'd have at your traditional, physical event. (After all, the fundamental reasons for having the kickoff are largely the same, right?) Plus, for many companies and their employees, having familiar objectives can help inject some much-welcomed normalcy into what's been a disruptive year.

4.
Define expected outcomes and metrics

As with your physical events, once you've established your objectives, think about how you'll measure success. Define expected outcomes, along with what success looks like. **Be specific, and include both attainable and "stretch" goals.**

For example, if one objective is to motivate your teams, what benefits do you expect from that? You might posit that you'll see an increase in retention and engagement. Quantify that too – e.g., 5% increase in retention; 3% increase in engagement. To measure these particular metrics, you might partner with your HR team, which likely already has attrition- and retention-tracking mechanisms in place.

Here's another example. Perhaps you've set an objective of skills development – where you'll be emphasizing sales qualification, along with how to demonstrate empathy in customer interactions. Outcomes and associated metrics might be, respectively, a shortened sales cycle (e.g., by 30 days) and increased customer satisfaction (a 3% increase in NPS).

While it's helpful to compare metrics year-over-year, leadership can also evaluate results within the context of the environment their company and people have had to face.

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5.
Decide on content themes


Elevate!

Ignite

Now it's time to operationalize your plan: finding the right mix of training, motivation and fun that will lead to a standout event. It can be a bit of a tightrope act to balance those elements, while also meeting the needs of executive leadership and customer-facing teams.

A good way to do this, though, is to get those parties' input. Query attendees in advance to see what they think makes SKOs useful and what makes them flop. Specifically, what are they looking to get out of this event?

While you don't want too many "cooks in the kitchen" and can't include everything, this exercise can help you assess priorities and what will positively impact your audience. Try to bucket their asks under various **content themes.**

For example, the theme of **"Tribal Knowledge"** could encompass requests for peer-to-peer sharing, team exercises, virtual productivity hacks and connection-building, among other elements. A **"Product"** theme could include updates and the company's vision/roadmap. **"Recognition"** could include celebrating customer wins, acknowledging high-performers and creating buzz (creatively, within your virtual format) – while acknowledging the challenges of the prior year.

Bake your themes into and throughout the agenda – not as tracks, but as types of information to incorporate within sessions.
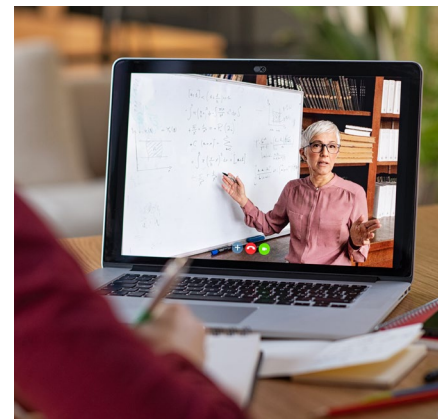
6.
Focus on logistics
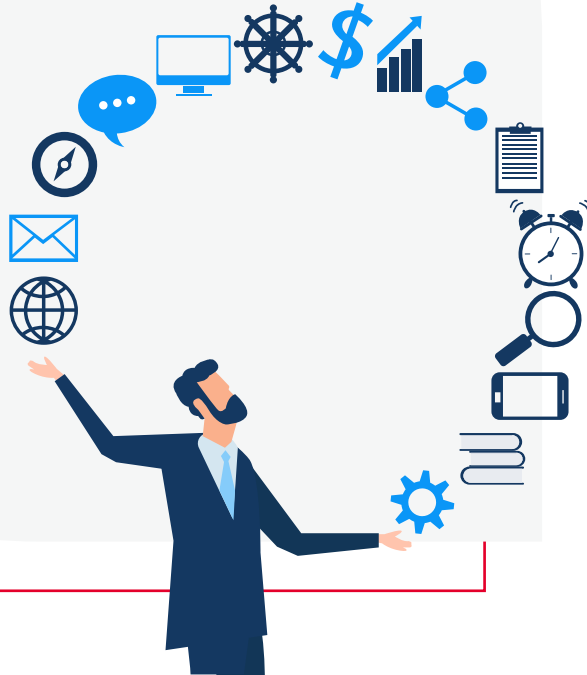
By going virtual, you'll encounter various logistical considerations, both big and small. Some include:

- **Event timeframe –** Will you hold your kickoff in a jam-packed day or two, or spread out sessions over multiple days? To best hold participants' attention, limit distractions and drive knowledge retention, it often works well to schedule 2-to-3-hour sessions, spaced out over the course of a week.

- **Live vs. pre-recorded –** Whether everything is live, pre-recorded or a mix of the two often depends on the geographic distribution of your teams. If you can support at least some live sessions, that typically helps everyone feel included and acknowledged.

- **Technology platform(s) –** Decide on the primary platform to support your virtual event. If portions are live, you might select a conferencing tool such as Zoom that also supports break-out sessions. For pre-recorded elements, platforms like Brainshark let you present information impactfully and track consumption. Also think about other tools you may need – including for collaboration, follow-up/comprehension activities, etc. It's important to have a back-up plan (and a back-up for your back-up) in the event of hiccups, so you can pivot and prevent disruptions.

- **Cameras required?** Choose what works best for your company culture. In general, requiring that cameras be turned on helps companies drive and monitor engagement, and foster accountability.

- **Virtual-friendly presentations –** Make sure all your speakers have engaging presentations, well-suited to your virtual format. That applies to company and customer presenters, as well as any motivational speaker you choose to include.

- **Event monitors –** Choose someone with a strong voice who is willing to jump in if speakers run overtime. You'll also need someone to make sure audience members remain on mute unless they're involved in a specific portion and to monitor feedback that comes in over the chat.

- **Q&A –** In some cases, you may want sessions to be highly interactive throughout. Oftentimes, though, it's best for flow to take and respond to questions at the end of a presentation.

- **Recording a live event –** While recording an event can be expensive in a physical setting, it's easier and cost-effective virtually. Your technology platform likely supports this, so you can archive valuable knowledge.

7.
Plan your agenda(s)

Here's a sample agenda. It includes:

- ✓ **A reasonable timeframe –** Attendees aren't asked to devote a whole day to this portion of the kickoff – just their morning hours. Accordingly, the agenda includes "bite-sized" training, which tends to be more easily remembered.

- ✓ **Executive presence –** This underscores the importance of the event/ subject matter.

- ✓ **Clearly defined daily objectives –** Attendees know what's expected of them and what they should get out of the day's sessions/what's in it for them.

- ✓ **Mix of speakers –** By varying speakers, you can reduce boredom and conferencing fatigue – keeping attendees engaged.

- ✓ **Peer-to-peer learning –** Reps often appreciate input and lessons from successful peers "in the trenches."Before setting anything in stone, review objectives with your executive leadership so everyone is aligned.

✓ **Knowledge application –** Brief homework, including video-based activities, can reinforce knowledge, help reps apply what they learned and even enable presenters to tailor upcoming content to the skill levels demonstrated. Standout video submissions can also be recognized the following day.

Where appropriate, also find opportunities for creative celebration and socialization that reflect your company culture.

Sample Agenda

8:30   **Objective of Meeting**
- What we want you to walk away with

9:00   **How Are We Going to Increase Our Product Revenue?**
- Road map presentation
- Competitive positioning

9:45   **Customer Wins**
- Best practices used in winning these deals

10:15   **Team Break Out**
- Provide various selling scenarios how to sell new product

11:00   **Discussion of Exercise**

**11:20**   **Wrap-up, Assignment for Tomorrow**

8.

Deliver pre-work
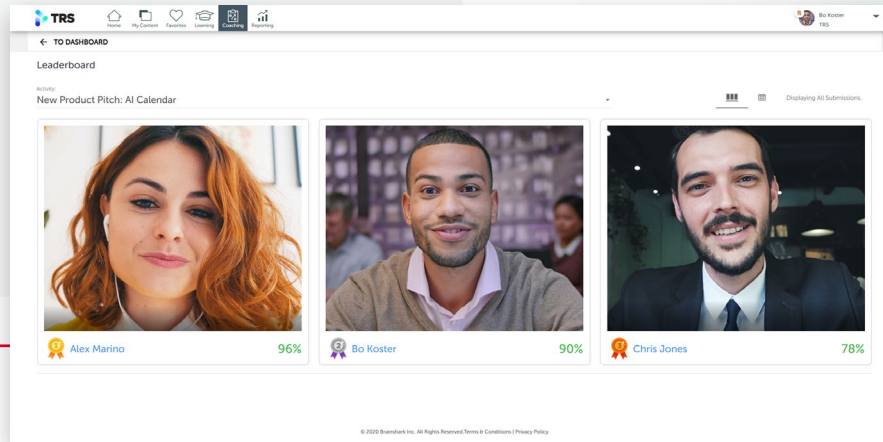
It's not optimal to walk into a meeting with no advance knowledge of the topics or proceedings. But, many organizations treat their SKOs this way. **Data shows** more than 6 out of 10 companies (62%) don't deliver pre-work to sales reps in advance of their kickoff, and 84% don't conduct advance training – neglecting to provide a foundation on the skills and topics that will be covered.

Using a sales readiness platform, such as Brainshark, you can deliver brief, engaging pre-work and on-demand training to reps, assess their comprehension/aptitudes, and then map session content to their knowledge levels – so it's most beneficial.

(Want to find out more? **Request a Brainshark demo here**.)

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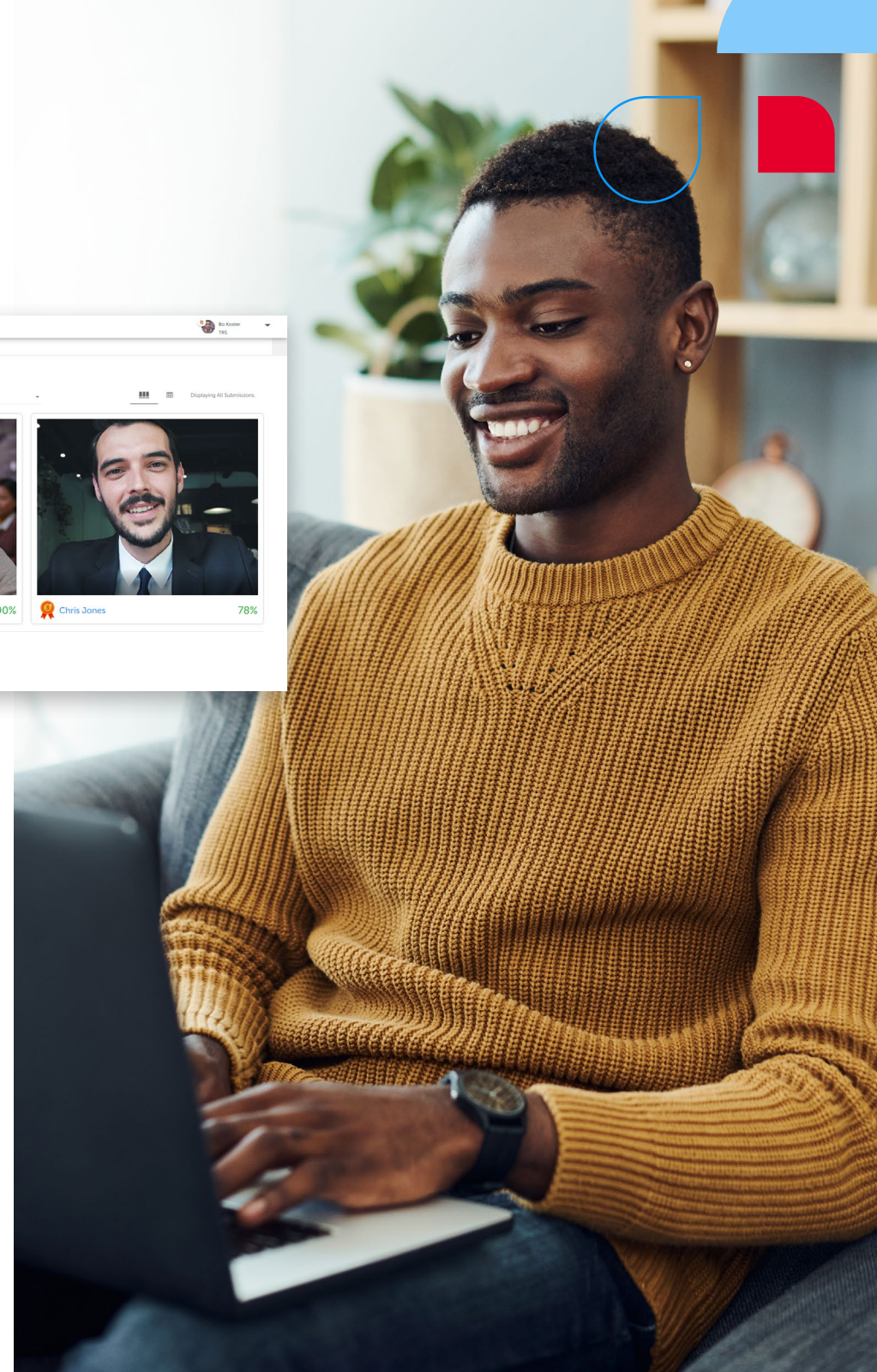
9.
Keep the momentum going

Your SKO shouldn't be viewed as a single, isolated event – but, rather, a springboard for the fiscal year. Accordingly, important concepts and knowledge covered shouldn't be immediately abandoned – but, instead, reinforced, put into practice and expanded on to get the most ROI from your event.

Again, this is an area where many organizations fall short – more than 7 out of 10 (71%) don't deliver SKO post-work or follow-up training to reps.

With the appropriate planning and technology, though, you can continue reps' learning journey. For example, a sales readiness platform such as Brainshark lets you:

- **Create and deliver on-demand, interactive training** – so sellers develop and retain critical skills and knowledge, with continuous learning from any device.

- **Employ video-based coaching and practice –** where reps receive assignments from managers/coaches (e.g., "Show how you'd pitch the new product we launched") and respond, typically with a video. Reps can practice in a comfortable environment, solicit and incorporate peer feedback, and submit their best "take" for manager review. Automated scoring and analysis – on elements such as the ability to stay on-message, emotions and personality traits exuded, use of filler words and more – adds an additional layer of feedback.

- **Get deep visibility into sales readiness –** with Scorecards that track readiness programs alongside key performance metrics.

(Request a demo to see how Brainshark can help increase the long-term impact of your SKO.)

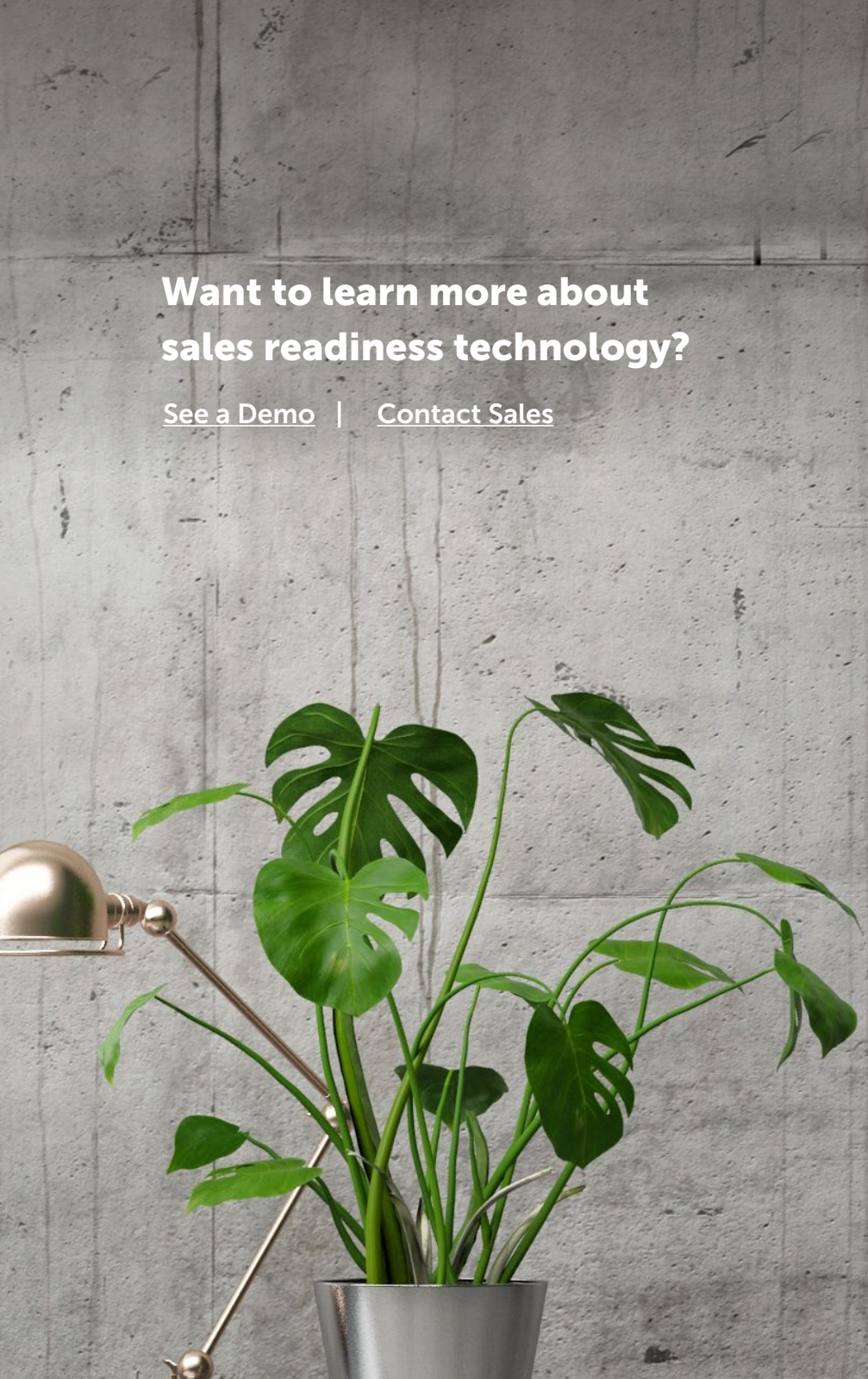**BRAINSHARK®**   www.brainshark.com | 781-370-8200

10.
Learn from the experience

When your SKO has concluded, it's time to assess the experience. Do this while it's fresh in your – and attendees' – minds. Survey participants on what worked well, what didn't and what they'd suggest for the future. Your planning committee can use this knowledge to make even more valuable events.

Whatever the format of your future SKOs and other major events, the lessons you've learned and planning you've done will continue to serve you well.

Want to learn more about sales readiness technology?

See a Demo | Contact Sales

About Brainshark

Brainshark's data-driven sales enablement and readiness platform provides client-facing teams with the knowledge, skills and resources they need to perform at the highest level. With best-of-breed solutions for training and coaching, as well as cutting-edge insights into sales performance, customers can ensure their sales reps are always ready to make the most of any selling situation.

With Brainshark, companies can: enable sales teams with on-demand **training** that accelerates onboarding and keeps reps up-to-speed; validate readiness with sales **coaching** and practice that ensure reps master key messages; empower teams with dynamic **content** that can be created quickly, updated easily and accessed anywhere; and use powerful **scorecards** to visualize sales performance trends and make real connections from improved readiness to increased revenue.

Thousands of customers – including more than half of the Fortune 100 – rely on Brainshark to close performance gaps and get better results from their sales enablement initiatives. Learn more at www.brainshark.com.