The Ultimate SALES KICKOFF Playbook

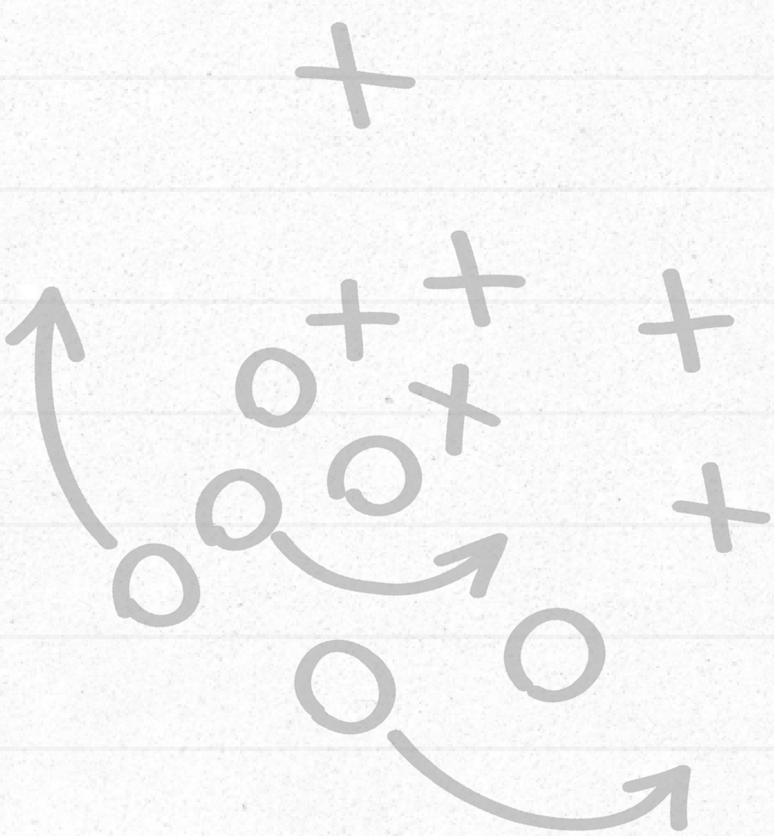
SALES NAVIGATOR

HubSpot

Introduction

Whether you're an individual sales pro, a sales leader, or a marketing demand generation professional, it's important to kick off the new year strong. You'll want to regroup from 2014 and properly align communication, execution, and reporting so everyone's on the same page and you can move at a more efficient rate in 2015.

This guide will give you tips for what you should do before, during, and after your sales kickoff meeting so you can hit your goals and scale exponentially. First, we'll go through the individual sales pro's agenda, looking at organization tactics, getting educated on new updates, and nailing your pitch. Next, we'll go over how a sales leader should refocus and think about a new strategy. Finally, we'll talk about the role Marketing plays in all of this, and how Sales and Marketing can better align in 2015. Let's get started…



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INDIVIDUAL SALES PRO

PRE SALES KICKOFF *for the Sales Pro*

>> REFLECT ON 2014.

Before thinking about how you're going to tackle 2015's quota, consider how you executed against goal in 2014. Did you exceed quota? Miss it by a little? A lot? No matter what the outcome, determine what specifically led to your success or failure.

And don't just ask your gut -- consult the data. Dig into your CRM and calculate the percentage of deals you won and lost based on how many leads you worked from. In addition, analyze your pipeline. Was there a particular stage where deals seemed to get stuck? If so, why?

Spend some quality time buried in analysis, and then write down goals for the new year based on where you were weak or strong in 2014. If you require coaching, don't be shy -- seek it within the first 30 days of the year, either from your manager or an experienced colleague. It's only by correcting your problems that you'll get better, so own them openly.

>> CLEAN OUT YOUR PIPELINE.

Odds are, you didn't close every single deal that was in your pipeline last year. So even though snow might still be on the ground, do some spring cleaning.

Review each and every deal in the CRM, and ask yourself: Is this likely to close this year, or is it dead? Honesty isn't only the best policy here -- it's critically important. Being unrealistically optimistic will only hurt when it's time to construct your plan for the year. If you're counting on revenue that is never going to come in, you might not generate the requisite number of leads to make your quota.

There's also a third category between alive and dead. Some companies might still be good prospects but are unlikely to buy in the foreseeable future. Take note of these buyers and hand them back to Marketing for additional nurturing.

>> BREAK DOWN YOUR QUOTA.

A giant annual quota number can be scary. But breaking it down into monthly or even weekly amounts can make your yearly goal seem a lot more attainable.

Once you have 12 or 52 mini-quotas, don't stop. Next, determine the amount of activity you'll need to complete in order to hit each goal. Using your personal lead-to-customer conversion ratio (if you don't know it, figure it out using your 2014 data), calculate how many leads, connect calls, presentations, and any other actions you'll need to do to convert the requisite number of prospects and earn the requisite amount of revenue.

Note: If you don't know your personal lead-to-customer conversion ratio, make sure to figure it out based on your historical data, and not the sales force average. This will give you the most accurate number on which to base your 2015 plan.

>> CLEAN UP CRM DATA.

Now, no judgment here, but data entered into the CRM isn't always the tidiest. Since Marketing uses CRM data to nurture leads through email and other campaigns, it behooves salespeople to clean up any messy data. After all, who likes to receive an email addressed to "<FIRST NAME LAST INITIAL>"? What might be shorthand to you looks like sloppiness to your prospect.

>> PREPARE TO MEET WITH YOUR MANAGER.

During the first meeting of the year with your sales manager, he or she will expect to see your pipeline, hear your plans for making quota, and learn your goals. If you've completed the exercises above, you'll be ready. Make sure to ask your manager if there's any other information he or she would like to talk about, and prepare for this conversation in advance of your meeting.

DURING SALES KICKOFF *for the Sales Pro*

>> FIND THE #1 REP OF 2014.

The top rep of the year and other individual sales awards will likely be announced at the sales kickoff. Make note of who had a record-breaking year and go out of your way to meet and talk to this person. Invite them to lunch or have a conversation during break and pick their brain about what they did that made them so effective. How does their process differ from yours? Are there practices you could add to your routine to make you more successful, or are there extraneous steps you could get rid of? Riding the high of their great year, the top performer will be happy to give you a glimpse into their methods.

>> INTERNALIZE THE TARGET BUYER OF 2015.

When the head of sales or CEO takes the stage, he or she will explain the strategic sales plan for 2015. In particular, listen for any changes to the target buyer personas. Is the company going after a different type of prospect this year? Your organization could be pivoting its target buyer in terms of:

- Company size
- Industry
- Need
- Location

These changes could be driven by the introduction of a new product, a competitive move, or a strategic decision.

After you've internalized the characteristics and attributes of the new target buyer persona for 2015, strive to understand what's causing this shift. This will help you to better approach your new or adapted target buyer with additional context and insight. For instance, if a major competitive move prompted your company to shift upmarket, this knowledge can help you better position your offering vs. theirs.

>> ABSORB INSIGHTS.

According to The Challenger Sale, prospects will buy from salespeople who can teach them something new about their business or industry. More and more sales experts are espousing the virtues of insight-based selling, and an increasing number of sales organizations are embracing this trend.

So in addition to talking about the new target buyer of 2015, your sales leader will probably also share insights to help you spark this prospect's interest. These could be a cost saving opportunity that the buyer isn't aware of, a strategic change that would benefit them, or an industry trend that threatens their business, among other possibilities. Make sure to carefully note these insights for use in cold messaging to capture your buyer's attention.

If your sales leader does not offer insights, you should strive to find some yourself after the kickoff meeting ends. If you strike on a framework or statistic that significantly boosts your connect or close rates, share with your manager as well as colleagues in marketing.

>> DISCOVER THE INSIGHTS YOU'LL BE MEASURED ON.

The #1 metric salespeople are measured on will likely never go out of style: Quota. But most sales organizations also judge salespeople on other metrics as well, such as customer satisfaction, prospect-to-customer conversion, or activity numbers. While you're at the sales kickoff, find out the top three to five metrics you're going to be judged on this year. A solid conception of what solid performance looks like to leadership can help you plan to be successful according to those guidelines.

>> FRAME PRODUCT UPDATES IN TERMS OF VALUE.

Sales leaders often present new products or updates to the sales team during the annual kickoff. While this exercise is important, bear in mind that prospects don't have the time or patience to listen to a list of features. Sales pitches should be about your prospect, not about your company. So instead of zeroing in on the unique attributes of the product or service you're selling, strive to make it about buyers by framing features in terms of the value they will reap. In product sessions, key in on the results customers can expect to see, and ask questions about ROI and value. You should also become an expert on the product, but prioritize learning about its results first.

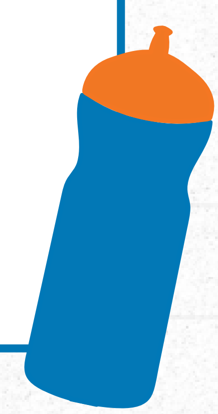
>> SPEAK UP ABOUT SOCIAL SELLING.

Buying habits have changed, and the writing on the wall indicates that social selling will become an ever more important weapon in the salesperson's arsenal. Consider the following statistics:

63% of VP-level and C-suite executives used social media platforms to support their buying decisions in the last year.
(SalesForLife)

64% of teams using social selling attained their quota, as compared to 49% of teams that hadn't incorporated social media into their sales processes.
(Aberdeen)

72.6% of salespeople who incorporated social media into their processes outperformed their colleagues.
(Social Centered Selling and A Sales Guy)



Despite these figures, social selling wasn't a major focus for many sales organizations in 2014. According to HubSpot's State Of Inbound Sales report, only 7% of sales organizations named social selling as a priority for 2015. Something's not adding up here.

If your organization hasn't yet jumped on the social selling bandwagon, talk to your colleagues about whether or not social is helpful for them, and brainstorm ways to systematize effective social selling practices. You might just start a valuable movement.

POST SALES KICKOFF *for the Sales Pro*

>> ADJUST QUALIFICATION TACTICS TO APPEAL TO TARGET BUYER.

If your company's target buyer is changing in 2015, you'll need to shift your qualification and prospecting processes accordingly. Remember to adjust your discovery questions to reflect the new type of buyer you're going after. For instance, while a prospect might have been qualified with a budget of $100,000 in the past, you might be seeking budgets of $200,000 or more going forward. Keep in mind that the answers that were once desirable might not be anymore. Your prospecting and messaging will need a facelift as well. Not every type of buyer responds the same way to the same messaging. What outreach channels will work best for your new target buyer, and what type of language and message do they prefer? Make sure to update any templates you plan to use in the new year to reflect changes made to the buyer persona.

>> REFINE YOUR VALUE PROPOSITION.

Sales messaging should be as customized and personalized as possible, but having a concise and compelling value proposition in your back pocket can help quell the "What is this about, anyway?" objection quickly. Remember to tweak your company's value proposition based on any strategy shifts that were announced at the sales kickoff. For instance, work in new products or services that your company now offers, or play up specific benefits to appeal to industries the company is focusing on.

>> READ NEW MARKETING/SALES COLLATERAL.

Once you're fully in the swing of the new year, it's often hard to find time to read and internalize sales enablement collateral. So make sure to set aside a few hours after the sales kickoff to thoroughly review new content. Bear in mind that these documents are prepared specially to make you more effective at selling and closing deals. The more you can incorporate the information into your processes, the more successful you will be. Look out specifically for buyer insights and behavioral data.

SALES LEADER

PRE SALES KICKOFF *for the Sales Leader*

>> REVIEW 2014.

You can't move forward without first looking back. So before you even start thinking about priorities or strategy for 2015, examine what worked and what didn't in 2014.

For instance, did the funnel get clogged at one particular area more often than others? Did the company struggle with too few leads? Maybe the presentation-to-close rate was where salespeople ran into trouble. Examine CRM data as well as information from any other relevant sales or marketing systems to reveal major sticking points.

Balance the quantitative perspective with the qualitative by scheduling meetings with individual sales managers and reps. What did they think were the biggest pros and cons of last year, and why? If the data is saying one thing and the sales force is saying another, work out the discrepancy by probing deeper.

Once you have an idea of the major advantages and problems the sales force experienced last year, formulate ways to capitalize on them or resolve them in 2015.

>> ANALYZE TOP PERFORMERS AND LOW PERFORMERS.

After you've identified the top salespeople of the last year, take a look at their activity data and pipelines against the information of the lowest performers. What did successful reps do differently that set them apart? Did they have a fuller funnel? Performed more activity? Had a higher than average connect to close rate? Supplement the data with in-person interviews, and ask about their processes and tips for success.

Take note of the traits or practices that set top performers apart and relay this information to your HR department. This way, these attributes can be worked into job descriptions and hiring profiles so you can recruit more top performers. This is also a good opportunity to take stock of talent gaps in your sales force and determine hiring plans for the new year.

>> DETERMINE 2015 STRATEGY.

In advance of the sales kickoff, call a meeting of the executive team and discuss major priorities for the business and the sales organization in the new year. If a new product is being introduced, talk about how this debut will affect sales game plans and compensation. Alternatively, it could be that the target buyer persona has changed, or the sales strategy. Determine what the high-level changes are along with executives across the organization, and then translate these shifts into individual rep responsibilities and duties. Think about how to explain the changes to salespeople in a clear and engaging way during the all-hands kickoff.

>> DETERMINE SALES KPIS.

Salespeople will naturally concentrate more on areas they know they're being judged on. So besides quota, strive to isolate a few additional performance metrics that will support the company strategy. For example, if the organization wants to fill the funnel with a different type of target buyer for a new product line, track prospecting activities. You might also consider compensating more on these activities or creating an incentive program or contest around them.

>> GENERATE NEW TECHNIQUES.

To achieve the new sales strategy in the next year, sales leaders need to present fresh techniques to their team. Think about what processes and activities would support the organization's goals, and then define how the sales team should approach these tasks. Remember that after meeting with top performers, you'll likely have some fresh ideas at your disposal. Don't miss the opportunity to bring what's already working for a few to the many.

The more tactical you can make these techniques, the better. Salespeople are hungry for tactical tips they can put to work immediately. So if you would like your sales team to shake up their prospecting, don't just suggest that they incorporate social media into their processes, give them specific tips and guidelines -- participate in this LinkedIn group, or search for that type of prospect on an industry networking website. Don't just suggest that demos need to be improved -- point to specific weak areas and provide concrete tactics to refine them. To systematize new techniques, insert them into the sales process by adding or adjusting a stage.

>> CREATE INSIGHTS.

Buyers won't just listen to any sales pitch, but their ears will perk up if a salesperson has something to teach them. With this in mind, work with Marketing to study and document buyer and/or business insights to enable salespeople. Armed with an attention-grabbing statistic that supports a larger story, it will be easier for reps to convert prospects into customers.

But note the mention of a story. One isolated data point might be enough to peak a buyer's interest, but it's not enough to sustain that interest. Make sure that this statistic weaves into a larger narrative about a problem or opportunity the prospect might not be aware of, or is currently handling in an ineffective or inefficient way. And craft the story so that your product or service is the solution at the end, not an unrelated point in the beginning or middle.

>> POSITION NEW PRODUCTS/FEATURES.

The sales kickoff is a good opportunity to present new products, services, or features to the sales force. So before the meeting, make sure to account for all new offerings you'd like to introduce to the team.

While providing deep dives into more technical products or features is a wise idea, keep in mind that buyers care most about the results that an offering will help them achieve. Accordingly, pay special attention to ROI when planning product spotlights. Salespeople often fall back on features when they don't have a good idea of ROI, and this is precisely what turns buyers off. Help your sellers to be as pro-buyer and results-oriented as possible by doing the legwork on ROI before the kickoff.

>> IDENTIFY THE BEST CUSTOMER SUCCESS STORIES.

There's nothing quite like reference customers for sales. If a prospect hears how a customer similar to them achieved the results they're chasing, suddenly they're more convinced of the value then ever before.

The best part about social proof is that it doesn't run out. One good anecdote can fuel the entire sales force. So in advance of the kickoff meeting, identify a handful of particularly remarkable customer success stories to share on stage. Also consider documenting these anecdotes in case studies or another kind of marketing material.

DURING SALES KICKOFF *for the Sales Leader*

>> COVER THE STATE OF THE BUSINESS AND COMPETITION.

Reps are often heads down working on their individual pipeline and deals, whereas sales managers and leaders are free to look up and around to assess the business as a whole and the competition. Because reps are generally mired in their own accounts, sales leaders should cover the state of the business during the sales kickoff meeting, and summarize any key events or points that individual contributors should be aware of.

And don't just stop at your own business -- leaders should also provide an overview of the competitive landscape. Reps need to be clued in on what the competition is doing and why in order to effectively position their offerings. The more reps know, the better they sell, so strive to provide as complete a picture as possible.

>> RECOGNIZE ACCOMPLISHMENTS.

Before diving into the new year, you should allot some time to celebrate the last 12 months. Identify milestones and accomplishments of the past year, both in terms of the team as a whole and individuals. Recognizing outstanding performance boosts morale and ignites salespeople's competitive drive. This also serves to point out the top performers to the entire sales force, which gives average and low performers the chance to mingle with winners and find out what they're doing differently.

>> PRESENT CORE SKILLS AND KPIS.

You took the time to interview top performers on their processes and determine what metrics salespeople will be judged on this year; don't keep this information to yourself. Be sure to announce core skills and KPIs publicly at the sales kickoff so reps are aware of what they need to work on. Be as specific as possible so salespeople can take action.

In addition, connect these KPIs and skills to the larger company goals so reps clearly understand how their actions and behaviors affect the entire organization. Also make sure to follow up the rep conversation with a presentation to sales managers, since they're the ones who will be coaching the skills and tracking the metrics. Present tactics for how to coach core attributes and give guidelines on what high achievement vs. low achievement look like in terms of selling and activity data.

>> ANNOUNCE NEW TOOLS FOR PRODUCTIVITY.

It's a golden era for technology targeted to sales reps. From quoting and pricing tools to presentation software to prospecting accelerators, there is a seemingly endless array of options to make salespeople more effective and efficient. Deploying a tool or two will take a measure of pain out of reps' workdays and make them feel enabled. For a complete list of productivity-enhancing technology, consult Nancy Nardin's top 40 sales tools of 2014.

One of the best technological win-wins for sales organizations is a mobile CRM app. According to Nucleus Research, mobile CRM can increase reps' productivity by 15%. Not to mention by making it easier and more convenient for reps for enter data, sales leadership has better visibility into deals. If possible, roll out mobile CRM to your sales force.

>> ISSUE A CALL FOR TALENT REFERRALS.

Referrals are one of the most effective talent acquisition channels. Since people usually keep similar company to themselves, top performers are likely to refer more top performers.

While you have the entire sales force together, request that reps keep an eye out for new talent. Make sure to include concrete experience, skills, and culture guidelines. Tell salespeople whom they should send promising candidates' resumes or LinkedIn profiles to to make it easy for them to follow through.

>> ANNOUNCE MAJOR CONTESTS AND INCENTIVES.

A sales kickoff is a time to drum up excitement and passion to achieve the year's goals, and nothing gets salespeople more excited than a good contest or desirable incentive. Unveil long-term contests that salespeople will be competing in this year -- as well as the prizes they stand to win -- and explain the rules and guidelines. Instead of a virtual announcement, revealing major prizes and competitions while the sales force is physically gathered together allows sales leaders to gauge the reaction immediately and pivot if need be.

>> USE A CREATIVE THEME.

Salespeople are experts in capturing people's attention, and dull presentations don't exactly make ears perk up. Make the meeting fun as well as informative to avoid putting your team to sleep.

To make your main messages stick long after reps have gone back to the office, craft a memorable tagline or rallying call that fits in with a unique theme. Here are some kickoff theme examples from sales author Steve W. Martin:

> Keep Your Eye on the Ball
> Swing for the Fences
> I Am the Brand
> Survivor: Outwit, Outlast, Outplay
> Special Operations: Mission to Win

Any salesperson worth their salt knows that stories live in people's minds better than bland pitches, so be sure to connect every presentation and speech during the kickoff back to the theme. Hand out merchandise with the tagline printed on it for a visual reminder that reps can put on their desks or tack up on their walls.

>> EMPHASIZE PRE-CALL RESEARCH.

In the age of social media, a cold call doesn't have to be totally cold. To warm up a first outreach, salespeople should research their prospects beforehand to customize their messaging as much as possible. If your sales reps aren't incorporating social media into their prospecting process, they should start as soon as possible -- or risk losing deals to the competition.

Here's a list of virtual spaces reps should check out before picking up the phone:

> LinkedIn.
What are this prospect's job responsibilities? What companies have they worked for in the past? What kind of content or updates are they sharing? Does the salesperson have any shared connections with this buyer?

> Buyer's Twitter account.
What do they tweet about? Who do they follow?

> Company's Twitter account.
How does the company present itself to customers?

> Company's press and media releases page.
Has there been any major news announced recently? Financial statements, leadership changes, product changes, customer announcements, etc.?

> Competitor press and media releases page.
What's going on with competitors that could be of concern to the buyer?

> Industry blogs.
What's happening in the industry?

> Google the company.
Is there any third-party news about this company that the salesperson should know about?

> Google the prospect.
Are there any personal tidbits the rep can find about this buyer?

Ensure that your team knows each and every sales call, email, or voicemail should be customized to the recipient. Explain that by making outreach relevant to buyers, salespeople will earn trust and attention.

POST SALES KICKOFF *for the Sales Leader*

>> CONTINUOUSLY GATHER FEEDBACK.

A sales kickoff might only happen once a year, but sales organizations should be constantly refining and optimizing their processes based on results. With this in mind, sales leaders should consistently gather feedback from the sales team on what's working and what isn't. Since reps are focused on making their quotas, sales leaders should act as the liaison with Marketing in case an idea for a new piece of customer-facing content or way of positioning a product emerges from the experiences of the sales team.

And the reverse is also true -- sales leaders should meet regularly with their cohorts in Marketing to garner insights or learn tips that could be helpful to reps. Best in class organizations have a tight bond between Sales and Marketing. As a sales leader, it's your responsibility to forge and maintain this bond for the betterment of your team.

>> ELIMINATE MANUAL LABOR AS MUCH AS POSSIBLE.

Salespeople's time quite literally translates into money for the organization. So it pays to reduce manual data entry that takes them away from active selling.

Again, use technology to streamline reporting tasks. If there's a shortcut that allows reps to spend more time with prospects, invest in it. Ask salespeople what their biggest pain points are and what tools would help them smooth over these rough patches.

>> IMPROVE ADOPTION OF CRM.

Every sales leader wants more accurate forecasting, which can largely be achieved through CRM adoption. The problem? CRM systems don't have the greatest reputation among reps. They are often perceived as time sucks that detract from more important tasks.

To improve CRM adoption, sales leaders should first show reps what's in it for them. Better analytics? Time savings? Find out what the upshot is for salespeople, and make this benefit known.

Second, verify that the CRM matches the sales process. If reps are used to working from one set of sales stages and the funnel in the CRM looks completely different, reps will get frustrated and enter their data hastily and inaccurately. Take the time to tailor the system to the exact model reps are used to.

Finally, integrate the system with other sales tools to reduce repeat data entry.

>> EXPERIMENT WITH MESSAGING.

Language is constantly evolving, so sales messaging shouldn't stay static. Buyers have changed dramatically over the past decade, so odds are what's always worked probably doesn't anymore. And there's only one way to find out what does speak to the informed buyer -- trial and error.

With this in mind, sales leaders should experiment with different voicemail and email constructions, as well as varied phrases and presentation styles. Make changes based on industry research as well as insights from Marketing. Be sure to track results and keep a close eye on the data.

>> MONITOR FLIGHT RISKS.

Star performers are more likely to get bored or disengaged with their jobs than average or low performers, so it's critical to regularly measure top reps' job satisfaction. Consider launching a monthly or quarterly survey or another employee engagement measurement tool. Getting a sense of who's dissatisfied and for what reasons can help you address problems before they drive your best reps into the arms of your competition. If investing in employee engagement measurement seems costly, just think of the revenue that vanishes if a territory is abandoned.

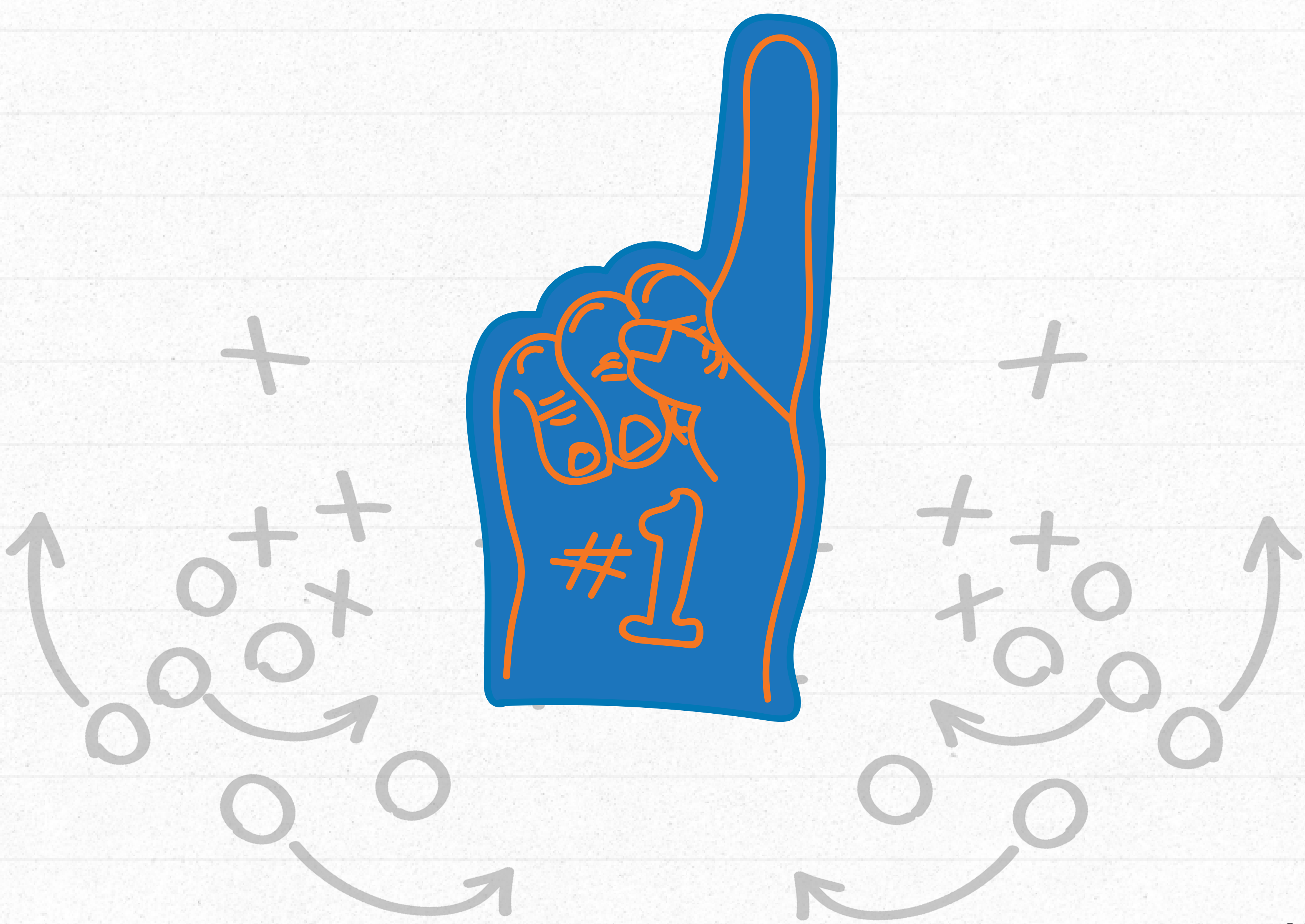
>> MAKE SOCIAL SELLING STICKIER.

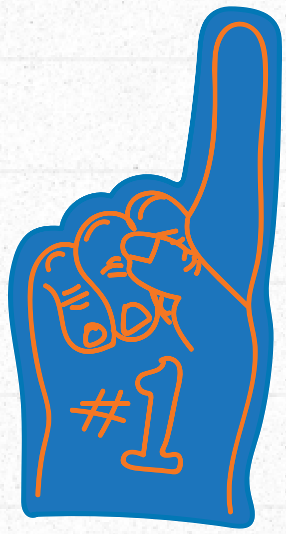
It's easy to make a change for a day, but more difficult to make a habit of it. Because social selling has a material impact on the results of the sales team, it's imperative to make it sticky among reps.

Similar to CRM adoption, make it clear what reps stand to gain through social selling --more prospects, better customer conversion rate, increased visibility, etc. In addition, bolster your business case with compelling data, such as the statistics included earlier in this ebook.

Lastly, consider creating a social selling checklist reps can follow, with time allotments associated with specific activities. What's a routine one day is a habit the next.

MARKETING DEMAND GENERATION





PRE SALES KICKOFF *for the Marketer*

>> DETERMINE 2015 MARKETING STRATEGY AND GOALS.

How many leads do you need to generate in order to make sales happy in 2015? How many of those leads need to be sales-ready or marketing qualified leads? Who are your target buyer personas for 2015? These are all questions you'll need to answer before the sales kickoff so both your sales and marketing teams can be properly aligned. Once you see the big picture marketing strategy and what your goals are, you'll be able to experiment with your day-to-day marketing tasks to determine what works best for your target personas.

Prepare an overview of big initiatives for the year. Sales needs to understand your activities, and how they will effect sales teams. For example, if marketing is focusing on two large conferences in the upcoming year, informing the sales team of these events, including timing, general information about content and topics covered, and how they can use that to their advantage, will help Sales be more successful.

>> INTERNALIZE THE TARGET BUYER OF 2015.

Have your marketing and sales management teams agreed on a target buyer persona for 2015? If not, make sure you have this conversation before the sales kickoff. This is critical for many reasons. First, it helps marketing create materials needed to support sales during the buying process. Second, it helps sales understand their potential buyer to the fullest, and therefore makes an easier sales process. Finally, alignment here creates a simple handoff of qualified leads from marketing to the sales team. Without this, Marketing may be generating leads that Sales has no desire to follow up with, causing inefficiencies, and let's face it, a bad working environment!

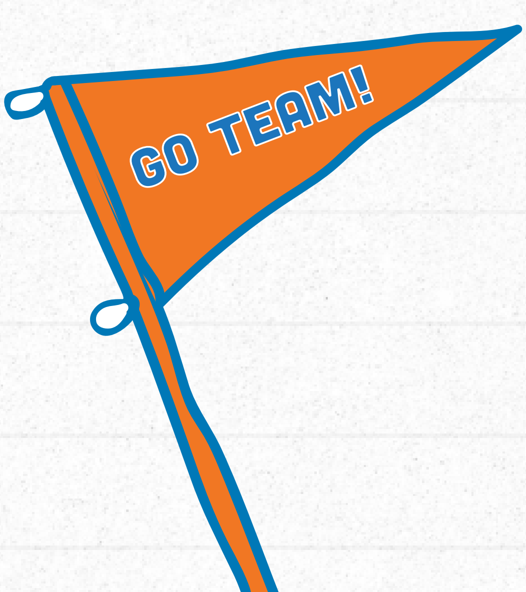
Whatever your specialized job might be on the marketing team, it's always important to know who is buying your products or services, and who is an ideal candidate to purchase in the future. If you know who you're aiming to reach, you'll be able to target your marketing better, experiment with context about what your audience would enjoy, and you'll be able to generate better quality leads for your sales team.

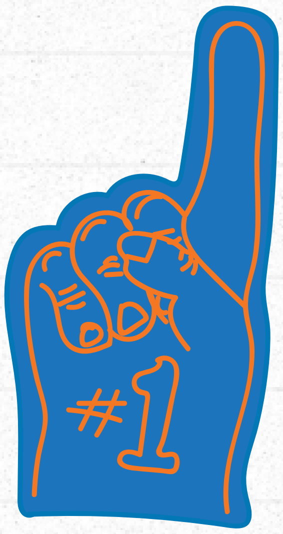
>> PREPARE STATS ABOUT THE PREVIOUS YEAR'S MARKETING ACTIVITIES THAT DROVE SALES.

If you are like most companies, your sales and marketing teams don't talk to each other every day. It is good for the marketing team to prepare a short summary of what they did in the previous year, as well as what worked and what didn't. At HubSpot, each month our CMO gets up in front of our sales team and has a 5 minute presentation on if we hit our goals or not, and what were the most successful activities. This helps the sales team understand where the leads they get each month are coming from, and which types of leads are the most qualified.

>> CREATE A SERVICE LEVEL AGREEMENT (SLA).

Sales and Marketing will need to come to an agreement on what each team is accountable for in 2015. How many leads does Marketing need to generate for Sales each month? What is required of Sales after those leads get passed over? These two traditionally opposing teams will work together much easier if you come to an agreement based on concrete, numerical goals.





DURING SALES KICKOFF *for the Marketer*

>> TAKE NOTES.

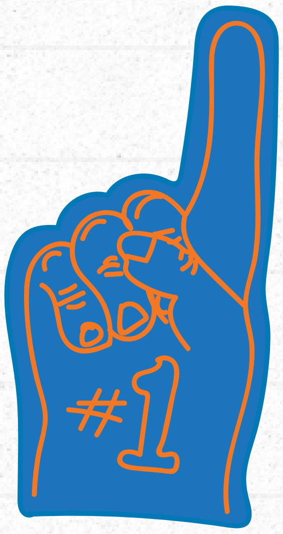
Even though a sales kickoff is for the sales team, the marketing team, or at the very least, marketing management, should also attend. Why? To make sure sales and marketing are aligned! (We call this Smarketing at HubSpot!)

What are the big sales initiatives in 2015? What pain points are sales reps talking about that they consistently see while trying to close a deal? What pain points are sales reps hearing from customers and potential customers? Use the answers to these questions (and more) to fuel the content topics you create in 2015. Maybe your sales team has a really hard time selling a certain part of your product. After listening to the sales kickoff, you as the marketing manger might realize it's because they don't actually know how to use that part! Then you can set up training for the sales team to teach them how to use and sell that particular piece of your product.

>> PRESENT.

Present that summary you created earlier of your previous year's successes and failures. Take it one step further and explain some of your 2015 initiatives.

Ask for feedback. The marketing team is, after all, there to support the sales team and help you grow your business. What worked for the sales team in the previous year from marketing, and what didn't? You can ask for informal feedback during the sales kickoff if your company is small enough, or formal feedback in followup communication. If you are looking to get anony-mous feedback, use a tool like Google Forms or TinyPulse.



POST SALES KICKOFF *for the Marketer*

>> EXPERIMENT WITH MESSAGING AND PRESENTATION.

Adjust your sales and marketing alignment based on what you observed in the kickoff. Do you need to change the way you communicate with sales? Do you need to create more content around a certain topic? Let this help fuel your content plan in 2015.

Once you have a good idea of who your audience is, what your strategy and goals are, and what new product updates you're faced with communicating, you'll be able to have some fun and experiment. You could experiment with internal messaging for sales enablement content, such as an internal product email or newsletter. Or perhaps you'd rather set up a sales and marketing alignment meeting once a month to go over product updates. You can experiment externally as well with marketing messaging on social media, in emails, on your blog, etc. Is there something you haven't tried yet that you think your audience might enjoy? If you're not sure what they'd enjoy, it might be a good idea to experiment anyway so you can see what works and what doesn't.

>> CONSISTENTLY COLLECT NEW LEADS.

Whatever your marketing goals may be for 2015, remember that it will always be helpful and beneficial to generate leads for your sales team. Maybe this year you'll experiment with putting a new type of content behind a form such as an infographic or slide deck instead of an ebook or webinar. Feel free to try new things, but also don't be afraid to revamp things that worked well for you in 2014. For example, do you have an offer that performed exceptionally well for lead gen in 2014 that you can update and launch as a "2015 edition?" This is a great way to work smarter, not harder, and consistently predict that you'll generate X leads for your sales team month over month.

>> QUALIFY LEADS.

So you've done some experimenting and you're now generating loads of leads for your sales team every month! Great! But do you know the quality level of those leads? Do you know if they actually close? Or do they require more work from the sales team than they're worth? It's important to get to the bottom of these questions so you can know if your marketing effort is actually making a difference when it comes to revenue. That way you can calculate the return on your investment and decide to keep or cut certain marketing activities, depending on how well they're performing. This is where analytics comes in – if you continue to measure every bit of your marketing, even when those leads are passed off to sales, you'll be able to pivot and move much more quickly with your marketing than you would without this data or information. We call this agile marketing.

>> PROVIDE SALES ENABLEMENT COLLATERAL.

Aside from generating leads for the sales team, one of the most important smarketing (sales and marketing alignment) functions is to create and distribute materials for sales to use during calls, product demos, etc. These materials are generally created by sales enablement or product marketing functions within the greater marketing team. For example, if your company just launched a new product or feature, it's hugely important for the marketing team to "market" that product to sales first, so sales can sell the features in an impactful way. You can think of this as ongoing training for sales, provided by marketing. Although it's something you'll want to think about before the sales kickoff, you'll also want to think about it throughout 2015 so the entire company can stay up-to-date.

>> MEET WITH SALES MANAGEMENT AND REPORT ON SLA ON A REGULAR BASIS.

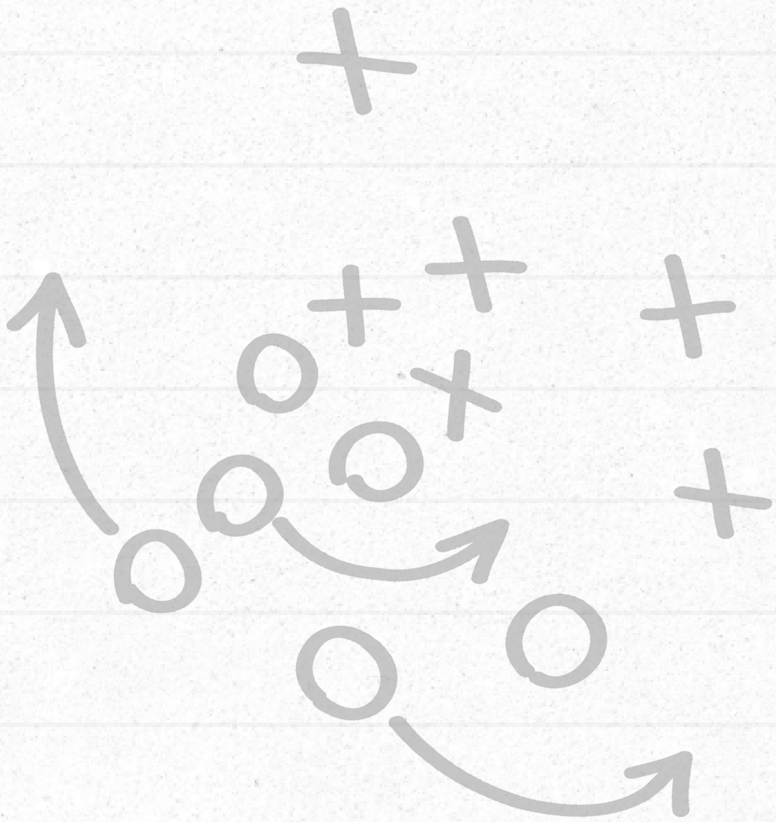
In order for an SLA to work properly, teams hold each other accountable through data, not opinion. Is the marketing team hitting the numbers that Sales needs in order to be successful? What does the lead to customer conversion rate look like? In order to align Sales and Marketing and keep the teams at peace, it's important for sales and marketing leaders to commit to a well-structured SLA based on hard data.

Final Thought

Now you've discovered what individual sales pros, sales leaders, and marketing demand generation professionals should do before, during, and after a sales kickoff meeting. No matter what role you're in, it's important to reflect on 2014, get organized, identify any communication gaps, and set up SMART goals and metrics for 2015.

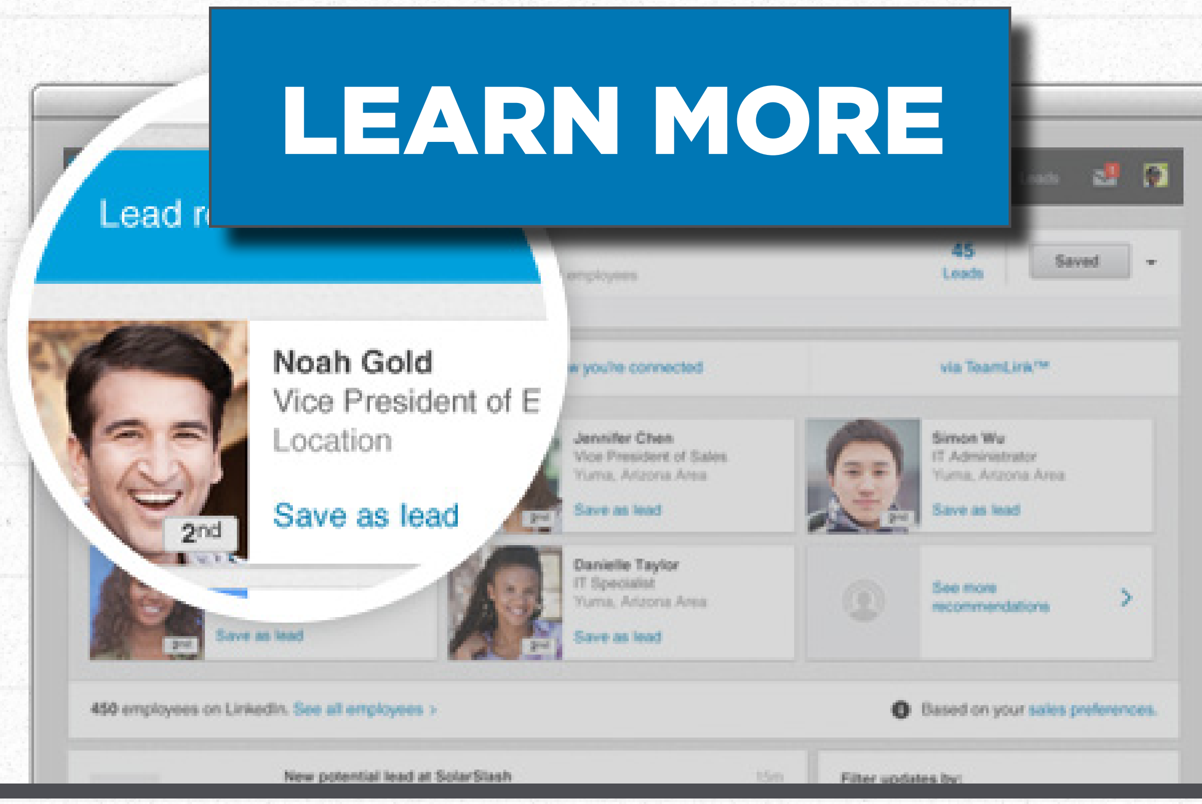
If you don't have an SLA set up between your sales and marketing teams (as we mentioned in Chapter 3), take a look at this blog post: "How to Create a Service Level Agreement (SLA) for Better Sales & Marketing Alignment." This post will show you how to calculate your SLA on the marketing side, on the sales side, and how to set up reporting for each.

To learn more about how to improve your sales process, take a look at LinkedIn Sales Navigator and HubSpot CRM on the next page.



SALES NAVIGATOR

Quickly discover the right people with suggestions customized for you.



HubSpot CRM

Organize, track, and sell without complications or confusion.