

The SKO Design Toolkit

A practical guide to designing a sales kick-off that still shows impact in the pipeline in Q4

Insight Revenue

What was the ROI of your last SKO?

For most revenue organizations, a sales kick-off is the largest enablement investment of the year, and the one least often properly measured. The team leaves energized, leadership feels good about the week, and unfortunately most often a month later no one can point to a deal that moved because of it.

The problem isn't the event. It's the design.

During our years at CEB (now Gartner) and Challenger, our teams studied why a few training initiatives changed behavior and most did not. Three stages separated them: Awareness, Adoption, Application. Almost every SKO is built to deliver only the first.

Around 80% of training content is forgotten within 30 days, so little of that momentum survives when the teams get back to a full inbox and the day-to-day grind. The same holds for product and technical training.



STAGE 01

Awareness

Priming the organization for change and forming a strategy to win a marathon just not a sprint. Without this, around 80% of the learning will be gone in 30 days. This best plans break down the silos and drive cross-functional alignment.

STAGE 02

Adoption

Deliver the skills and process teams need to execute the strategy. Both training and live practice should be designed as part of the event and be ongoing afterwards. The post-event plan must be approved before anyone arrives at SKO.

STAGE 03

Application

A (minimum) 90-day change management program that embeds the new behaviors into day-to-day activities, provides ongoing learning and drives your ROI by making sure the team actually improves performance.

The other two stages are where your enablement spend pays off, so plan them into the event from the start.

This toolkit sets out the principles behind an SKO that changes behavior, a detailed sales training plan, and a plan for the 90 days that follow. Take what’s useful. The agendas are illustrations, not templates: a real design has to be built around your strategy, your deals and your gaps.

WHAT COULD THIS LOOK LIKE?

The SKO can sit at any stage of the journey

Awareness, adoption and application always come in that order. What varies is where the live event falls. Use your SKO time to maximize the team learning together even if you start your team development before or after the event.



Whatever you are teaching, whether it’s a sales skill, a product release or a system change, it follows the same pattern: awareness, then adoption, then application. Only the timing changes. Awareness might come in a general session, with adoption and application after the event. Adoption might fit into a team breakout. Or awareness and adoption might happen before anyone travels. An SKO has impact when everything you teach goes through all three stages.

Your SKO is the first 10% of a change program

This one shift in thinking changes every decision that follows.

"Design it as a week and you get a week's worth of results. Design it as the opening of a 90-day change, and the week becomes the most valuable part of something that keeps building." Zach Gropper, CEO, Insight Revenue

This matters more in 2027 than it did five years ago because of what most teams are launching in January some combination of: a new platform story after acquisitions, an AI-enabled product line, a new segment, a new methodology or a repriced portfolio. None of these is a simple product update. Each one asks the team to sell differently.

Our research is clear about the gap this opens up.

53%

of the buying decision is driven by the sales experience itself.

50%

of qualified deals stall out in no-decision.

72%

more people are involved in a purchase than sellers anticipate.

Selling a broader, higher-stakes story to a larger, more cautious buying group is a harder job. An SKO that announces the new story without rebuilding the conversation sets the team up to fail, however good the intentions.

Four design rules

Every SKO agenda we build rests on four rules. Each one fixes a common reason kick-offs fail to change how the team sells.

01 Deliver the HOW, not just the WHAT

Most SKOs spend their time on what the team should do and very little on how to do it. "Move customers toward the platform." "Multi-thread and deepen relationships." "Lead with outcomes, not features." These are strategy statements. None of them tells a rep what to say on Monday morning.

Shift the balance toward practice. For every hour spent telling the team what changes, spend at least two hours building each individual skill to do it. Do it in a safe setting, where reps can get it wrong and be coached before a customer ever hears it. A simple test: if more than a third of your draft agenda is presentation, you have planned an announcement, not a kick-off.

Sellers are resourceful. Finding their own way from A to B is how they earn commission. But when every rep works it out alone, you end up with a dozen versions of the pitch deck and a different message from every part of the go-to-market team.



02 Less rah-rah, more aha

The lift from a motivational keynote fades faster than the hangover from the awards dinner. Inspiration still matters. It just has to be earned.



What energizes a sales team most is a new way of seeing its own deals, especially one that makes the pipeline look more winnable. Reps get excited by an insight they can picture using on their next call. Open with the research on why deals stall, not with how Everest was conquered and how it might relate to perseverance in prospecting.

03 Build the managers, or skip the rest

This is the rule that gets cut when time runs short, and it is the one that decides the result. Gartner's data shows that teams with high-performing coaches finish 19% better against goal. So the first, probably uncomfortable, question you need to ask is 'do my managers coach at all?' Then you need to ask 'do they coach well?' If the answer to either is 'no' then an investment in coaching is a necessity.

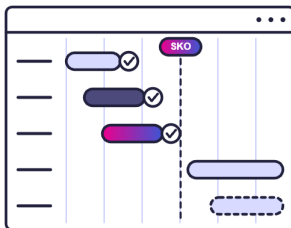
With a team of Managers who can coach then you have the ideal team to help you drive home whatever training you are running. They can help with the training on the day and more importantly they can help maintain standards and drive behavior long after the training. Managers are a secret weapon in driving the SKO's ROI. That said we then need to treat the Managers accordingly - so they are trained with or ahead of their teams and they know what their roles will be at the SKO and afterwards.



04 Approve the reinforcement before the event, not after it

This is the flaw behind almost every SKO that fails. It isn't a lack of discipline. It's a matter of planning.

Here is how it usually goes. The January event lands well and someone suggests building on it. A hasty reinforcement plan is drafted in February. No matter whether running internally or with an external partner you're spending the first critical 30 days, where the team loses 80%+ of what they learned, planning the reinforcement, so by the time it arrives usually months later **there's very little momentum to build on.**



Treat reinforcement as part of the SKO, not a follow-up. It is part of the same decision, in the same budget, approved at the same time. If it isn't funded and scheduled before people fly to the event, it won't happen.

Once that's settled, the rest falls into place: preliminary communications sent two to three weeks earlier and attendance mandated, post-work launched within a week of the event, and manager coaching that starts the following Monday.



It wouldn't be an SKO without...

Whole team, general sessions



Include Working Together and Role-specific tracks

Interactive breakouts

SDRs

Account executives

Account managers

Customer success

Partner managers

Solution architects

IF TIME AND BUDGET ALLOW



Excursion
to the city
that's hosting



Cross-team
exercises



Motivational
speaker



T-shirt cannons



Decompression
areas

Designing and delivering a compelling experience

A familiar scenario: It's November, and the kick-off is ten weeks away. You have a team of 120 AEs, CS and SDRs. In the last 18 months the company has bought two businesses, and in January you will ask the team to sell all three products as one AI-enabled platform. Customers, though, have always bought them separately. Deals are already taking longer to close, and more of them are ending in no decision.

The design problem. Your sellers know how to sell three products. Now they need to sell one outcome, to a bigger and more skeptical buying group with more senior people in the room. A new slide won't get them there. They need a new conversation.

Preparation during SKO planning



1

Sales behavior & coaching diagnostic

Short survey across the team. Output shapes the final agenda and gives leadership a baseline to measure against.



2

Call recordings reviewed

Five to eight real calls, used to build the customized scenarios. Signed off by managers.



3

Key stakeholder & customer interviews

Engaging teams across the GTM organization and ideally at some clients to understand 'your world'.



4

A plan for change

Each rep brings live deals to work on during the SKO, so the skills drive immediate impact on real pipeline.



Not comfortable with creating diagnostics? This is our bread and butter. [Get help here](#) or drop us a line at info@InsightRevenue.com and we can design it for you.

SKO Leadership brief · 2 to 3 weeks before

Managers see the plan, and their part in it, before the team does.

ITEM	WHAT IS COVERED
01	Managers' role at the SKO. Where they lead, facilitate or coach during the training
02	Managers' role in the reinforcement. The most important part of the brief. What they own once the event closes, and when.
03	Coaching requirements. What training they will be receiving and how they will be required to use it with their teams.

Sales Training Day 1 · Why the conversation has to change

TIME	WHAT	WHY
08:30	Science of Growth. The research on what actually drives buying decisions and how high performers win. Discuss where & why deals break then map to the strategy of 'why change' and 'why now'.	Shows sellers what top performers do differently, so the gap feels specific and closable. Generate excitement to get on this journey.
10:30	Break - opportunity for meeting partners etc.	A breather after the opening session, and a chance to meet partners at their booths in the break area.
11:00	Elevate the Conversation, part 1. Creating deep focus on the client's business and stakeholders to develop our Connection and help Shift their thinking helping put us in a Trusted advisor role.	Helping sellers break the "us first" feature/benefit mentality and develop some real client-centric thinking
12:30	Lunch - opportunity for sponsorship and networking	A chance to eat, discuss topics, and potentially network with partners or other team members.
13:30	Elevate the Conversation, part 2. Continuing working in groups to build out the Cost of Inaction (COI) 'Key Ingredients' for success and 'Our Difference' to create a compelling message for our stakeholder	Introducing Sellers to the concept of loss aversion and the impact of 'COI' vs pitching 'ROI'
14:30	Mastering Discovery, part 1. Understanding how to assess the customer's world, their current state, their performance gap, and what an ideal scenario would be for them.	Building a picture of the customer's world - moving away from a checklist approach
15:30	Break	
16:00	Mastering Discovery, part 2. Enhancing discovery by leveraging better questioning techniques	Understanding how to leverage open and targeted questions to dig below the surface of customer needs
17:00	Recap, close and preview tomorrow's training. 'What we learned?' from attendees.	Solidifying today's lessons and previewing tomorrow.

Day 2 · Creating better deals delivered live or virtually

TIME	WHAT	WHY
08:30	Day 2 Kick-Off: Ice-breaker Exercise and Objective Setting.	Reinforce yesterday's content and get sellers thinking in the right way.
08:50	Objection and Obstacle Management. The PAUSE framework. Root-cause the objection rather than rebutting it. Find out friction points in the customer organization and help them manage the required change in mindset or workflow in advance. Worked group exercises against real world objections and roadblocks.	Introduce and practice using the PAUSE template for Objection Management to help sellers understand the 'why' behind the objection and use insight.
10:30	Break	
10:45	Stakeholder Management. Understanding the buyer profiles, mobilizers, talkers & blockers and how to work with those profiles.	Helping sellers engage with the right stakeholders to drive action.
12:00	Lunch	
13:00	Opportunity Management: BRIDGE Part 1. The full customer value roadmap. B Blueprint the strategy and the buying group R Reframe with insight I Illustrate impact against their metrics D Defuse objections G Gauge the options, including do-nothing E Execute a joint plan	Bring all the concepts together to manage an opportunity through the pipeline.
14:30	Break	
15:00	Opportunity Management: BRIDGE Part 2. Teams apply BRIDGE to a live opportunity from their own pipeline, with managers coaching in the room.	Every rep leaves with a started account plan on a deal that matters.
16:00	Deal-strategy face-off. Teams present a BRIDGE plan on a live account. Judged against the model, not on showmanship. Prize worth winning.	Helps everyone define what good is whether presenting or giving feedback
17:00	Wrap-up. Recap the two days and introduce the reinforcement exercises that run through the next 90 days.	This is where the work starts on the other 90% of effectiveness of an SKO....

DELIVERING CONTENT VIRTUALLY

Virtual sessions can be delivered over a number of weeks with a maximum session length of 2 hours and are often used when SKO time is short. This type of live-first hybrid approach enables spaced learning and helps with reinforcement, so should not be looked upon as a lesser option.

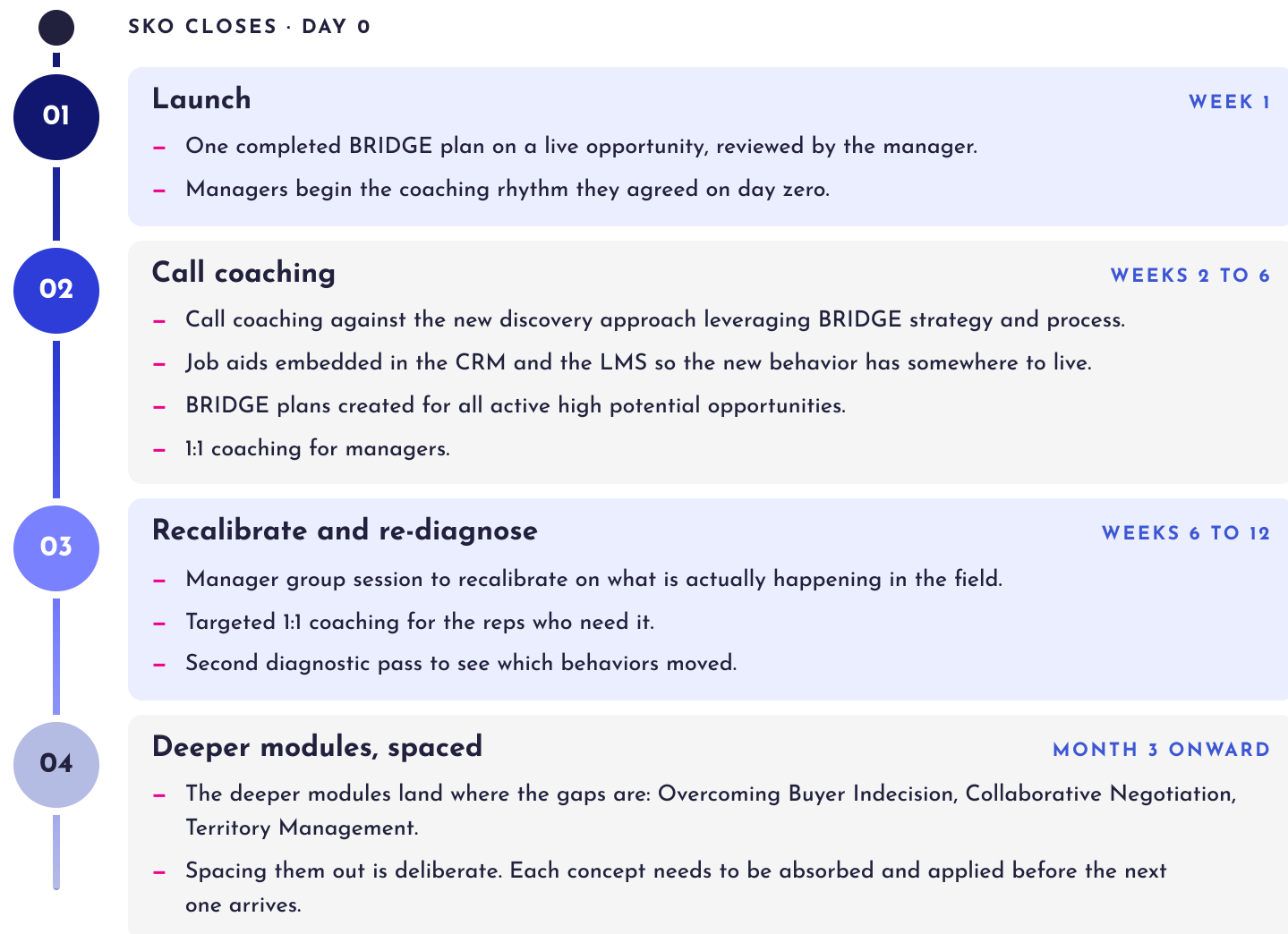
Manager Coaching Training

Managers stay for an extra day of Coaching Training

TIME	SESSION
09:00	Coaching Sales Teams. What is actually changing, why, and what it demands of them. The diagnostic results for their own teams.
10:30 - 12:00	The GROW model applied. Coaching the new behaviors specifically. Not generic coaching skills.
13:00-14:45	Observation calibration. Same call, every manager scores it, then reconcile the differences. This is the session that stops eleven managers reinforcing eleven versions of the same thing.
15:00-16:45	The Operating rhythm. What lands in their calendar from the Monday after. Coaching cadence, pipeline review changes, what they will be asked for at T plus 30.

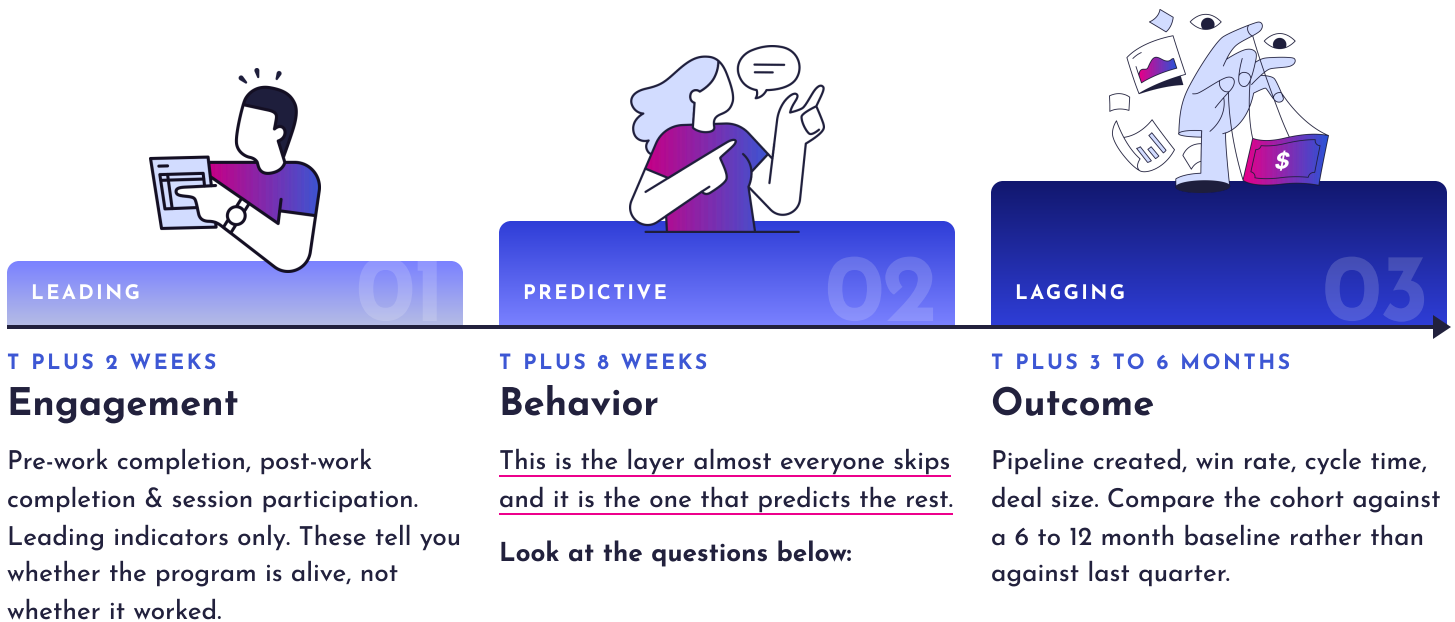
Post-work · The 90 days that make this count

This is where the week turns into revenue.



What to measure

Most SKOs are measured on a satisfaction survey, which tells you whether people enjoyed the week. Measure three layers instead.



BEHAVIOR QUESTIONS TO ANSWER AT T PLUS 8 WEEKS

- ? Are discovery calls structured differently?
- ? Are formal BRIDGE account plans being built on real opportunities?
- ? Are buying groups being mapped?
- ? Are managers running the coaching rhythm they committed to?

Where we come in

Every engagement is built around your team. The curriculum grows out of a diagnostic, interviews with your people, and a review of your collateral. The program is then taught through your own case studies and scenarios to make adoption natural.

Need help? If you're designing a kick-off and want a second set of eyes on the training agenda, we run a limited number of design sessions each season. Each is a 45-minute working session, with no deck. You bring the agenda and the strategy; we pressure-test them against what we've seen succeed and fail across hundreds of implementations.



PRESSURE-TEST YOUR DRAFT AGENDA

Forty-five minutes, working session, no deck. Reach out!

info@insightrevenue.com

