

Fearless Thinkers, Episode 6  
"4 steps for successful sales kick-offs"  
with Adam Boggs, Matt Archer, and Melia Coury

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**Masami:** Welcome to Fearless Thinkers, the BTS podcast. My name is Masami Cookson, and our host today is Rick Cheatham, our head of marketing at BTS.

Today he is joined by Adam Boggs, Melia Coury, and Matt Archer from the Sales and Marketing Center of Excellence at BTS.

Hey, Rick. Can you give us a preview of what you talked about?

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**Rick:** Sure, Masami.

It was great to spend time with these three. For those of you who know me at all, I've spent my whole career in sales and marketing and really see things like sales kick-offs as incredibly important opportunities to inspire and equip your team to do really great things. And the good news here is that they were able to lay out for us four principles that any of our listeners could just go use today to make these things a lot better.

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**Masami:** That's awesome. It's always helpful to get practical advice that you can use right away. Let's jump in.

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**Rick:** Wow. Well, this is the first time we've had three folks join us at the same time. And I would like to thank you all for being here, and welcome.

This is when somebody says something like, thanks.

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**All:** Thanks. Thanks for having us. Happy to be here.

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**Rick:** So, we're talking about sales kickoffs today. As someone who has been in sales and marketing pretty much my whole career, it seems like a staple. It seems like a given. But I'm wondering how, in the world we live in now – with technology working the way it does, and communication working the way it does – why are people still doing sales kickoffs?

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**Adam:** Rick, I'll take that. This is Adam. I think the tried-and-true formula, right? Celebration, kind of a look to the past. How do we accomplish our goals from last year? Building excitement for the future. Getting everyone

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together in person, even if it's virtual. That sort of recipe still exists.

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**Matt:** Yeah. And I'd have to say, it's an opportunity for people to educate in this world that we're in today. We've over-rotated to the education of people through, you know, product training and whatnot. But this is an opportunity—educate them on where we're going, and why we're going there.

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**Melia:** I'd also add that it adds in this nice human element. A lot of times, this could be the first time that they're getting the whole sales org or go to market org together. And either if it's in person first by meeting in person, even if it's over Zoom or virtual, it's giving them the opportunity to get to know these people outside of just a normal work setting, and that's invaluable.

I'd say it's a couple of things. It's it's programing. So: what does everything the flow look like? It's the speakers and their presence and those added elements of... Maybe there's some fun music. And then at the end of the day, it's the content.

What are you talking about? What are these people experiencing? Is it just, you know, product after product after product and over-hashing things that have already been said? Or are they experiencing something new, seeing their customers in a new light, and getting to connect with other people in their organization they don't always get to talk to?

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**Rick:** What are some common mistakes that organizations are making in their sales kickoffs today?

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**Adam:** There's a lot of historical inertia. The common mistake that we see clients take, is, let's take a look at last year's agenda and just kind of copy and paste that and then refill in what the topics going to be that are slightly different. But the rhythm is the same, right?

It's a C.R.O. kick off. It's the head of product getting up and talking about the new product features. They might be somebody from marketing, talking about how others are going to be pushed into the marketplace.

The sellers are just sort of sitting there for several hours, just taking it right and maybe not acknowledging the reality that you mentioned of today: coming off of COVID, people are exhausted. They want to get more immersed. They want to feel like this is a special event

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that's been custom-designed for this moment for them right now.

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**Rick:** So, you've all said in different ways. And I'm curious, Matt, because you were the first one to bring it up: the importance of getting the content right. What are some ways of thinking or filtering, for lack of a better way of saying it?

Because, as you were just saying, Adam, everybody wants to say something.

How do we work towards making sure that what we're putting out there really is useful and resonates and makes the most use of the time?

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**Matt:** I think there's a couple of things that you need to factor in here. First off, you've got to get alignment with the leadership team around: what is it that they're trying to accomplish?

Oftentimes, this is a rogue group that goes off and says, we own this. That's completely misaligned from what the organization's trying to accomplish. That causes some challenges because last minute, the sales leader usually looks at the agenda and says, well, hey, I've got a better way of doing this. And everybody's scrambling. Another would be just not identifying what the red thread is between all of the different sessions. So, what happens on main stage?

What happens in the first breakout room where a product comes up and talks about how their new innovative acts helps them do something new? All of that has to be connected, and people need to be able to see and feel and believe that red line or that red thread that exists between all of the different sessions.

And then, the last thing is, we've got to get away from turning this into a menu of options.

When people are going through, especially in the virtual world, there needs to be purpose. There needs to be intentionality with the structure of their agenda, so that they know what they need to do. But more importantly, they know why they need to do it.

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**Adam:** What Matt's talking about, I think it's really critical. The training, if there is some, it needs to be sort of weaved throughout in a in an intentional way.

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And we also have to give time and space to hear from sellers. We've got a group of people who are out there talking to customers every day. So rather than just pushing content on them, it's a unique opportunity for us also to listen to them.

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**Rick** So, if I were to kind of summarize what I'm hearing you all saying... There's got to be some clear intentionality in the whole design, in the experience; making sure that the experiences are designed in a way that leaves impact and that lives beyond the event.

That makes a lot of sense to me from a content standpoint. What other things have you all learned that you'd like to share about what makes a great sales kickoff?

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**Matt:** Sure. So, the first one is going to be purpose, and it's really the, how does this connect us back to our business and what's in it for me as a seller?

The second one is going to be space to personalize, right? And this is the opportunity for us to be... Just... It's the intentionality around creating that space for me to to reflect on why I'm here, why am I doing this? Why are we moving forward? Or, the new content, the new idea. The third component is around ownership.

Ownership is really around accountability and making sure that we provide and put in the hands of that seller or that manager the tools that they need to author the way forward.

And the last component here is around intentionality. And this is commitment to take action. Or more importantly, what specifically are we going to drive in the field that we'll see results around?

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**Rick** Cool. All right. So, Melia, you were talking about something earlier that I would just like you to go a little bit deeper on.

Obviously, time is short and time is precious, but one of those huge outcomes of allowing people to connect with each other and having space and time to do that is one of the most important reasons to do these kinds of things.

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How do we create space for people to connect at a sales kickoff, but at the same time manage the priorities of what we've got to do?

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**Melia:** I would love to say just use less content, but I understand that's not always actually possible from the powers that be.

So, I think, being intentional about how the content is being digested. Can you create a two-minute micro video that explains something that normally would take 45 minutes of a speaker get up on stage?

Can you have a bunch of different Choose Your Own Journey breakout options, so that people can go to this workshop or that workshop that everything's maybe being recorded, so that people can go back later and look at all of the content and then they're going to hear from their friends, Oh man, this was cool. You should have gone to this one.

And then they're like, they have that, like angst of like, oh, like I went to the wrong one because I just wanted to go with my friends. And you've got these real human-connection moments happening and this real-time bonding just because of the way that you've built out your program.

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**Rick:** Yeah, and I think you also clicked on something that has happened to us all. And I often refer to it as the Google-ization of our brains: that most of us now expect to be able to get a four-sentence summary. And if I want to go deeper, maybe watch a video, join a discussion group, possibly go through some sort of experience that really allows me to practice.

If I'm kind of interpreting what you're saying is, make sure that we're pushing everything that we can into the platform that's the easiest to consume, not necessarily making sure that everybody gets their moment on the stage.

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**Melia:** Oh, 100%. I mean, there's the way our brains work. We can't remember everything from a long 1, 2, 3, 4-day event. All you need to do is kind of give trailers, if you will, of what's to come and people can dig in deeper to, you know, the feature film later.

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**Rick:** Makes a ton of sense. So, great concepts. I'm wondering if maybe you all could share an example of when you've seen this done incredibly well. What does it look like?

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**Adam:** One of the more recent examples I took on was with a client that had sort of three distinct product market units. One was around I.T., one was around security, and one was around something called observability. And we put a theme day together for each of them.

The cadence was sort of similar, right? Teams would go into a kind of a main stage, some discussion around what that market looks like for us, and then pretty quickly going into team breakouts to sort of discuss and debate the different competitors that we face. We put them into simulation right where they got to play a competitor selling against themselves, playing it themselves, selling against a different market player, and then ultimately going into what we call an idea hunt, where people get to come up with new ideas around how they would do this in the marketplace today and have those rated by team members.

And then the next day was sort of a similar theme, right? But a different approach to given the different product segment.

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**Matt:** And I'll share a slightly different example where we were the precursor to the experience to set up their leadership team for, not only success during their broader scale, but to set context for how they were going to proceed in the rest of the year as the company that had been doing incredibly well, growing like a weed.

But more importantly, they had been not only financially growing like a weed, but also from a personnel perspective. And this was a great opportunity to bring together over 200 people in an environment where most of them had not met each other over the last probably three years that they had been working together. And what they actually needed to do was not align around the excitement of the company and the growth strategy – it was actually to align around the direction that they wanted to go.

And working with their CEO, we were able to set context for what does it feel like to be in the CRO, in this fast growing company? What are all the different types of decisions that I would have to make? But more importantly, what are all the decisions that they have to make that and the prioritization around those decisions that would enable the company to continue to grow. Because everything was on the table. How did they land on what the critical few were going to be for that upcoming year?

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And as part of this experience, we helped them identify their six go-to-market strategies for the year and then enabled the sales leaders and sales managers to get their arms around them through a simulation of, "What is it going to take for us to execute this not just at our level, but also, how do we push that down through the rest of the organization?"

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**Adam:** And Rick, if I can just add one more example. One of the one of the challenges that we often find with clients that we work with is they always want us to get customers involved. The best ones put a customer panel at the end of the experience, right where they get their top three buyers, and they fly in from all over the world or put them on a virtual screen, and it's kind of a long 30 minute conversation with a Q&A.

One of our clients we work with, we got a little bit more creative. And we still did a panel. But prior to that, for the full day and a half, we actually had those customers involved throughout a simulation that we actually had built prior to, with them, where the sellers actually got to sort of take off their selling hats, take on one of the roles of somebody who is in marketing and sales, somebody who is in engineering, right? Somebody who was in product development.

Going through the different scenarios, trying to decide on what is the right approach to drive the metrics that they were most interested in, and then having those teams come together and essentially run the entire company together. And so then, when the customers got up to debrief and to talk, they were discussing the trade-offs, right?

The simulation choices that the teams had made. And, you know, people said that, look, I see a lot of you chose Option A, I tried option A, actually, in real life. Here's what happened. So, Option B might actually be the right one for you guys to think about. For my business, in my approach, it was it was really successful.

It was interactive way to get customers and sellers working together.

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**Rick:** Cool. Sounds like a great experience.

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**Matt:** Rick, I think the only thing I would put out there is, you know, while these principles are critical to successful sales kick offs, these principles, this

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approach, this belief is relevant to any large scale event that a client is putting on because diving into and tapping into purpose of the organization or of the team, providing some space for reflection and personalization for the individual, creating an opportunity for ownership or ultimately the authorship of the way forward, and then being intentional about the commitments that we're going to take moving forward.

Those are all principles that will align incredibly well to any event that people are putting on. It just happens that we're talking about sales here, but many, many events, whether it's HR, whether it's a leadership offsite, whether it's something else, even a product launch. All of these principles can hold true, and it really just comes down to: who are you serving? And at the end of the day, at the center of any of these experiences, it's about – serving the team, immediately, so that they can better serve their customers.

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**Rick:** Gosh, Matt, I think that that is actually a fantastic perspective. I think so many times people lose sight of the audience when they're putting these things together. So actually I'm thankful for you adding that here at the end.

And with that, I thank all of you for your time and I'm sure we'll have lots to talk about. As needs in the world of chaos continue to evolve and great new ideas surface. So thanks for joining me today.

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**Others:** Thanks, Rick. Thanks, Rick.

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