

Sales Leadership Offsite: Agenda

Month, Day

Time	Session	Led By
8:00 am	Meet at location	All
8:00 am	Breakfast	All
8:30 am	Kickoff & Executive Vision	VP of Sales
9:00 am	Reflections, Annual OKRs, Performance Against Plan	VP of Sales
9:30 am	Operational Lookback & Grouping	Directors
12:00 pm	Past Year Opportunities & Ranking	VP of Sales
1:00 pm	Break for Lunch	All
1:30 pm	People Groupings & Situational Bucketing	Directors
2:30 pm	Being a Leader in [The Company] Sales	Directors
3:30 pm	Training: How to Read a Room	Manager
3:45 pm	Training: How to Appeal to Different Learning Styles	Manager
4:00 pm	Break	All
4:15 pm	Top 5 Opportunities: “The How”	VP of Sales
6:00 pm	Wrap Up/Next Steps/Daily Reflections	VP of Sales
6:30 pm	Cleanup + Depart	All
7:00 pm	Dinner + Team Building	VP of Sales

Breakfast: 30 minutes

Catered Breakfast arriving at 8am.

- Agenda for discussion
 - While eating, we will go around & each state what we hope to get out of the day.

Kickoff & Executive Vision - VP: 30min

- Pre-Reads / Prep
 - Pre-Read (mandatory)
 - Executive Offsite Notes
 - Future of [The Company]
 - Sales Narrative (with H2 addendum)
 - Mid Year Annual OKR Results
 - Pre-Read (non-mandatory)
 - H1 Offsite Notes
 - H2 Offsite Notes
- Agenda for discussion
 - Opening Remarks
 - [The Company] Vision [Year]
 - Agenda for the Day

Reflections, Annual OKRs, Performance Against Plan - [Team Member]: 30 min

This session will be backwards looking & informational in nature (white hat thinking). We will look at outcomes inside of the core business, review annual OKRs & how we are projected to finish, and will conclude with my general take on what's gone well & not so well.

- Pre-Reads / Prep:
 - Pre-Read (mandatory)
 - Company Performance
- Agenda for discussion
 - Review key financial drivers
 - Annual OKR Review + Pacing

Operational Lookback & Grouping - [Team Member] - 150 Minutes

This session will be backwards looking and focus on positive-logical (yellow hat thinking) & negative-logical (black hat thinking) outcomes. Our annual objectives can be broken out into six unique workstreams:

1. Rep Productivity

- a. Conversation quality, coaching, deal prep, time & pipeline management, rep workflow, etc.

2. Origination Funnel

- a. Connect rate, deal size, cvr, revenue per opp, etc

3. People

- a. Recruiting, hiring quality, new hire training, ongoing training, career development, culture/feel, general team sentiment, etc.

4. Renewals & Upsell Funnel

- a. Outreach strategy, conversation quality, focus, rules/roe, all funnel metrics from origination, etc.

5. Enterprise

- a. Enterprise AE role, process/systems, team dynamics, etc.

6. Operations & Systems

- a. Tooling, change management, cross-functional plug-ins, frontline support, team dynamics, compensation plan, etc.

Our group has grown too large for us to all collectively discuss each topic. Therefore, we will be breaking into two teams:

- **Team Stardust - Productivity, Origination Funnel, & People**
 - [Team Members]
- **Team Moonshot - Renewals, Bank/Prime, Operations**
 - [Team Members]

Agenda:

- Each topic will get a 40-minute allotment.
- For each topic, team members will spend time writing post-its on positive logical outcomes & negative logical outcomes. The moderator will be responsible for grouping these outcomes into themes.
- Once we have positive & negative themes for a topic, we will go a layer deeper and move to “feel-based” causality (red hat thinking). Team members will write out the top causes for the positive & negative outcomes. The moderator will then be responsible for grouping said causes into common themes.
- We will repeat this three times (once per topic) before coming back together as a group.
- Once back together, each team will share their outcomes & causes with the broader group.
- We will then attempt to group common positive & negative causes.

Pre-Reads / Prep

- Please check what team you are on & prepare your thoughts for the topics you are assigned.

[Year] Opportunities & Ranking - [VP of Sales] - 60 Minutes

By this point we should have a firm grasp on business performance and an understanding of common causes in our positive & negative outcomes. We will use the preceding session to inform a discussion around our biggest opportunities going into [Year].

- Agenda for discussion:
 - Everyone will write out (yes post-its again!!!!) what they believe our top 5 opportunities are as a sales team.
 - We will each share & group these into common opportunities.
 - We will then populate each “opportunity” into an excel doc and each of us will rank them highest to lowest in order of importance.
 - We will sum the scores & use the information for a session later in the day.

Lunch - All - 30 minutes

- Catered lunch arriving between 12:30 - 1.

People Grouping - [Director(s)] - 60 Minutes

We will shift gears to start the afternoon with a conversation around the current team. We will have a discussion about the current state of team performance & bucketing. We need to have an understanding of where the majority of the team falls to resource plan & help drive focus.

- Pre-Reads / Prep (mandatory)
 - What is Situational Management?
 - Please insert a ranking for each of your reps (we are ranking them against our “personas” from the recruiting scorecard). Each frontline manager has a placeholder with their name. Please delete your name and add all of your reps.
 - Read through [previous year] sales attrition (names removed)
- Agenda for discussion
 - Each manager places their teams across the 4 buckets
 - Discuss themes from placement & from the document
 - Identify our next 5 Managers + any attrition risks
 - If time - look backward on most common attrition reasons

Being a Leader in [The Company] Sales - 60 minutes - [Director(s)]

We are going to transition from discussing our reports into discussing ourselves. Specifically, what does it mean & feel like to be a member of the sales management team?

- Pre-Reads / Prep (mandatory)
 - Management Principles
 - Principle Ranking (from last time)
 - Update your ranking
- Agenda:
 - Define 2-3 most important job buckets in sales management (operational, cultural,)
 - Post-it exercise per job bucket
 - Determine most important competencies per buckets & have defined [The Company] sales manager job description

Best Practice Sharing - 30 Minutes - [Manager]

We will run two sprint training sessions on topics a few our managers are excellent at.

- Agenda
 - [Manager] - How to Read a Room
 - [Manager] - Appealing to Different Learning Styles

Break: 15 minutes - All

Top Five Opportunities, “The How” - [VP of Sales] - 105 minutes

As evident from our executive offsite notes, we need to be aligned & focused on “how” we do things - now more than ever. It is our single biggest blocker at the company level. Our morning session on opportunity ranking will inform this discussion where we will be discussing tactics & grounding ourselves in reality on what we can actually do.

- Agenda
 - We will go item by item and write out tactics or “how” we would think about seizing each opportunity.
 - We will then group common/overlapping tactics.
 - Once tactics are grouped, we will discuss what needs to change in how we operate as a team (i.e. change management, communication, accountability, etc)

Wrap Up + Next Steps - [VP of Sales] - 30 minutes

- Agenda
 - Discuss feedback from the day: What did we like? Not like?
 - Determine immediate next steps & assign ownership
 - Closing remarks

Dinner + Team Building

- Agenda
 - Pre-fixe family-style meal
 - **Start/Stop + Continue**
 - What is Start, Stop, Continue
 - Similar to the operational lookback session, our group is too big for us to give feedback to everyone. You will be giving feedback to the people on your teams from earlier in the day. I.E. Team stardust will give feedback to all members of team in stardust and team moonshot will give feedback to all members of team moonshot.
 - I will be giving everyone feedback, and am fair game for everyone to give me feedback (it's encouraged)
 - Please come prepared with a “start” **or** “stop” and a “continue” for each member of the team (two items per person). We will go around at dinner & share our feedback