Quarterly Sales Kickoff (QSKO)

Sales Leadership Guide

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The Problem with Traditional Sales Kickoffs

Most sales teams rely on a single annual Sales Kickoff (SKO) to set the tone for the year. While these events may generate short-term excitement, they rarely lead to measurable improvements in execution and sustained results.



Lack of Feedback Loops: Once the SKO is over, sales reps and managers are left with a plan that quickly becomes outdated.



One-Directional Communication Leadership presents goals and strategies, but there's little room for real-time adjustments or personalization.



Limited Accountability Without regular touchpoints and dedicated practice, new initiatives lose momentum and old habits take over.

Most sales leaders excel at holding themselves accountable; it's what made them top performers as individual contributors. However, many struggle with how closely to manage their people, unsure of when to intervene and when to step back. The truth is, most reps need more help with self-management than their leaders assume. Striking the right balance between autonomy and oversight is critical.

To solve these issues, the **Quarterly Sales Kickoff (QSKO),** powered by WINS™ offers a structured, repeatable framework that keeps sales teams focused, accountable, and consistently improving.

Quarterly, Not Just Annually

Rather than a one-time, yearly SKO, the Quarterly SKO (QSKO) allows team members to distill annual targets into 4 unique sprints, each with 13 opportunities to review progress and refine their approach. This 4 x 13 mindset shift creates:

- **Manageable Targets** – Big annual income and revenue targets are broken down into seasonal objectives that are aligned with natural business cycles.
- **Frequent Feedback Loops** – Teams assess performance, identify gaps, and make timely corrections before small issues become major problems.
- **Stress-Free Accountability** – Reps and managers remain aligned on ownership of targets and actions, making follow-up a welcome part of the team's continuous improvement.

With a structured quarterly cadence, sales teams operate with **greater precision, adaptability, and confidence.**

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A Three-Stage Structure

Each QSKO follows a three-stage structure designed to distill strategic commitments into tactical execution.

1. Revenue Commitments (Annual)

- **Annual Quota** - The minimum expectation set by leadership.
- **Annual Goal** - The minimum expectation the salesperson sets for themself.
- **Annual Target** - The honest aspiration of the salesperson upon which their plan is built.

Sales reps gain clarity on their expected results, personal ambitions, and commitments. This serves as the foundation for establishing quarterly and weekly objectives.

2. Revenue Levers (Quarterly)

To meet their annual commitments, reps reverse-engineer and express their quarterly plan using the **Four Revenue Levers of the Sales GPS:**

- Number of Opportunities
- Average Deal Value
- Average Win Rate
- Average Sales Cycle Time

This structured approach eliminates guesswork and creates the leverage required to turn small successes into exponential gains - **the 8% rule.**

3. Revenue Activators (Weekly)

To meet quarterly targets, sales teams must understand how the decisions they make and the actions they take determine the outcomes they create.

- **Fill Your Pipeline** – Align marketing and lead gen activities.
- **Deal Momentum** – Monitor how process stages and in-meeting execution stall or stimulate sales flow.
- **Confident Commitments** – Lead buyers to controlled conclusions and well-managed transitions.

Sales leaders shift from reactive management to proactive coaching, ensuring reps engage in high-impact activities.

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Aligning All Four Wheels for Performance

To make QSKOs effective, James uses the Four Wheels of the Car analogy to illustrate the key components that drive sales success:



Front Left: *Process Drives*

A three-stage approach that converts buyers into champions of change and every team member into an elite top performer:

- **Interview (don't pitch)** – Discover and disrupt by collecting your Eight Points of Evidence.
- Educate (don't propose) – Expand the buying center by educating buyers on the value of addressing their 'real' problem.
- Recommend (don't defend) – Establish the understanding, trust, and respect of an expert, trusted advisor, and thought leader.

Front Right: *Salespeople Execute*

When people are hired and developed to fit, not to fix, you put the right people in the right seats and become your industry's employer of choice:

- Can and Will – Every team member joyfully accepts the standard of continuous improvement in their role and the rewards of self-management.
- Transparency and Accountability – Every team member has the success they deserve and takes accountability for what they control—decisions, actions, and outcomes.
- Vulnerability and Authenticity – Every team member contributes to a culture without shadows because there is no reason to hide —no victims, only leaders.

Rear Left: *Management Serves*

Make the time to do it all by improving the organization and delegation of your most important responsibilities as a leader and manager:

- **Hiring and Retaining** – You know why your people win, why they lose, what is required to succeed, and how to source, screen, and select the right fit.
- **Challenging and Developing** – You earn the respect required to lead your people to and through each new goal they create and obstacle they face.
- **Activating and Assessing** – You deliver the accountability and motivation required to ensure each team member does the work and achieves the standards you set.

Rear Right: *CRM Tracks*

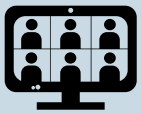
A single source of truth that reinforces predictable patterns of success, improves the efficiency of your sales pipeline, and predicts buyer behaviors:

- **More Impact** – The more it's used, the more effective, efficient, and effortless your role and your goal become.
- **More Income** – The more it's used, the more you make, with top performers investing 18% of their work week on average.
- **More Fun** – The more it's used, the more time you have free from the pressure and stress created by monthly and quarterly goals.

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Frequent Huddles & Touchpoints

Between QSKOs, WINS™ encourages **daily, weekly, and monthly management check-ins** to help sales team members strengthen their own "self-management" skills and keep execution on track.



Daily Standups:
Salespeople flag potential risks and ensure calendars and pipelines reflect reality.



Weekly 1:1s:
Reps and managers review Revenue Activators, discuss key conversations and progress, and refine specific actions to close performance gaps.



Monthly Check-Ins:
Teams step back to align on Revenue Levers, assess trends, and make necessary rep-level or territory-level adjustments.

In addition to these touchpoints, individual reps should be encouraged to continuously:



Monitoring Peaks and Gaps:
Spot whether milestones are being hit, and where intensity or support needs to shift



Requesting Coaching and Resources:
Proactively engage peers and managers when challenges arise.



Refine Revenue Activators:
Continuously adjust effort and focus to stay aligned with targets.

The goal is to reduce surprises, improve coaching effectiveness, and maintain alignment between reps, managers, and company objectives.

Self-Coaching and Daily Workflows

With QSKOs in place, individual contributors gain the tools to self-coach and optimize their daily approach:

- **Immediate Visibility** – CRM dashboards highlight team rankings, overdue tasks, and pipeline risks.
- **Reduced Guesswork** – CRM reports provide clear targets and cause and effect insights into all four revenue levers.
- **Ownership of Success** – CRM process flows let salespeople know exactly where to focus their efforts to close performance gaps.

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Repeat, Refine, and Celebrate

Each QSKO provides an opportunity to evaluate, adjust, and improve:



Planned vs. Actuals
Did the team hit their revenue activators, levers, and commitments?



Successes and Failures
What worked, what didn't, and what adjustments are needed?



Monthly Check-Ins
Evaluate wheel alignment and your three-stage structure.

Implementing this repeatable framework makes it easy for sales teams to focus, improves manager and peer coaching, and allows revenue organizations to deliver scalable revenue growth regardless of what's happening around them.

QSKO Launch Checklist

- ☑ Define annual revenue commitments by confirming company goals, rep quotas, personal goals, and stretch targets.
- ☑ Set quarterly revenue levers by calculating the opportunities, deal value, win rate, and sales cycle time required to overachieve monthly, quarterly, and annual commitments.
- ☑ Identify weekly revenue activators that align prospecting, deal momentum, and closing motions as part of detailed territory and/or named account action plans.
- ☑ Establish a consistent coaching cadence with daily standups, weekly 1:1s, and monthly performance reviews that are driven by the rep and supported by their assessment leading indicators of success.
- ☑ Prepare your CRM to track key metrics, surface risks, and provide real-time dashboard views into performance.
- ☑ Communicate the QSKO rollout clearly with a team kickoff, shared expectations, and an open channel for feedback.

The result? Sharper visibility, higher accountability, stronger forecasting, and sales teams that consistently over-achieve their goals.

Want help getting started?

Book a free strategy session with James
to help plan your QSKO implementation and rollout.

Book Today