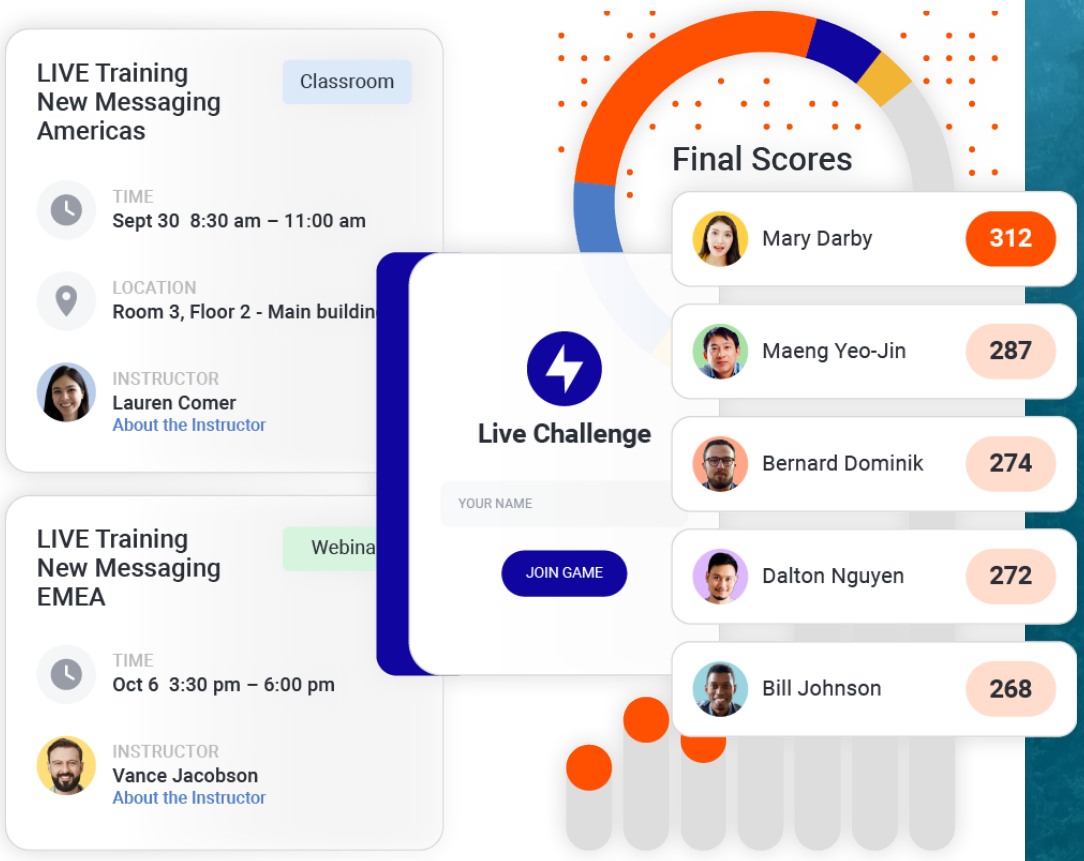
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2027 Hybrid Sales Kickoff Checklist

Hosting a virtual or hybrid sales kickoff (SKO) doesn't necessarily mean you're in for less planning than with a physical event. In fact, there are logistics to consider when hosting your event virtually that might not be necessary if you had all of your reps in the same room.

The good news is that, with careful planning, it's possible to conduct a virtual sales kickoff that's engaging, informative, and impactful for your field team. To help you prepare, we've put together this checklist to help map out your to-dos and ensure that you have all the bases covered on the big day.

Covering pre-event activities, the in-event experience, and post-event follow-up, this checklist will guide you through everything you need to make your upcoming virtual or hybrid SKO a success.



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Pre-event activities

3 months before

- [ ] Set a meeting with your leadership team to discuss your organization's goals for the quarter or year. This will help you determine how to set sales goals that fit into the company-wide strategy.
- [ ] Establish a theme to center the event around. Make sure to tie your content, talk tracks, and activities back to this theme.
- [ ] Send out a calendar hold to all attendees. This might just be your sellers, but it's common to loop in other revenue teams like customer success and marketing. If you plan on having guest speakers from across your organization, make sure they receive this invite too!
- [ ] Determine your delivery strategy. Will you be hosting on-demand sessions to encourage self-paced learning? Or will you be live-streaming the full event?
- [ ] Ensure you have the right tech in place to execute your delivery strategy.
- [ ] Determine if you want to send out any swag bags or physical items for attendees

1 month before

- [ ] Review initial drafts of each session with presenters and stakeholders, gathering feedback and tweaking content and delivery.
- [ ] Gather all pre and post-work and determine the delivery and timelines for attendees to complete.
- [ ] Plan out in-event quizzes, discussion questions, and other challenges based on the content that's going to be covered at your kickoff to keep things interactive.
- [ ] Finalize the agenda with stakeholders including event details for all presenters.
- [ ] Review top performers to start allocating recognition and awards.

14 days before

- [ ] Share your agenda and any supporting materials or log in details with your attendees.
- [ ] Assign your attendees any pre-work to be completed prior to the event.
- [ ] Invite your attendees to a Digital Sales Room where they can access all materials, and information, and collaborate on planning/pre-work.
- [ ] Mail any swag bags or physical items to get your teams excited for what's to come.

7 days before

- [ ] Coordinate a dry run with all presenters and ensure that their presentations are compatible with the tech you're using to host your event. If these are on-demand sessions, start loading them ASAP!
- [ ] Begin reviewing reps' pre-work assignments so you can showcase or reward the best submissions at your SKO.
- [ ] Pull sales performance data, industry insights, and competitive intel to share at your event.

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In-event experience

- Keep your audience engaged by incorporating quick quizzes and discussion questions into each of your sessions throughout the day. Keep track of scores on a leaderboard so you can reward the winner(s) at the end!
- After each session, send digestible takeaways to reps on their mobile devices and post them in the SKO Digital Sales Room to reinforce learning outcomes.
- Incorporate breakout sessions to encourage participation and spark engagement.
- Recognize top-performing sales reps with an awards ceremony to foster a culture of recognition.

Post-kickoff follow-up

- Send out a post-event survey to all attendees to gain audience insights on delivery, content, and engagement.
- Launch all post-SKO work for the teams to complete with clear expectations and deadlines.
- Make all content available for your sellers to review so they can brush up in preparation for calls and meetings.
- Send key takeaways from the SKO as mobile notifications to ensure your content stays top of mind.
- Leverage virtual role-plays for sellers to practice their message for products launched at the SKO. Use these role-plays to evaluate how well your messaging resonated.
- Develop a cadence for ongoing training between this SKO and the next to reinforce learning and development for reps.
- Leverage clips from SKO presentations or sessions as just-in-time learning content.



Want to see how Mindtickle can help you plan + execute a world-class SKO?

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