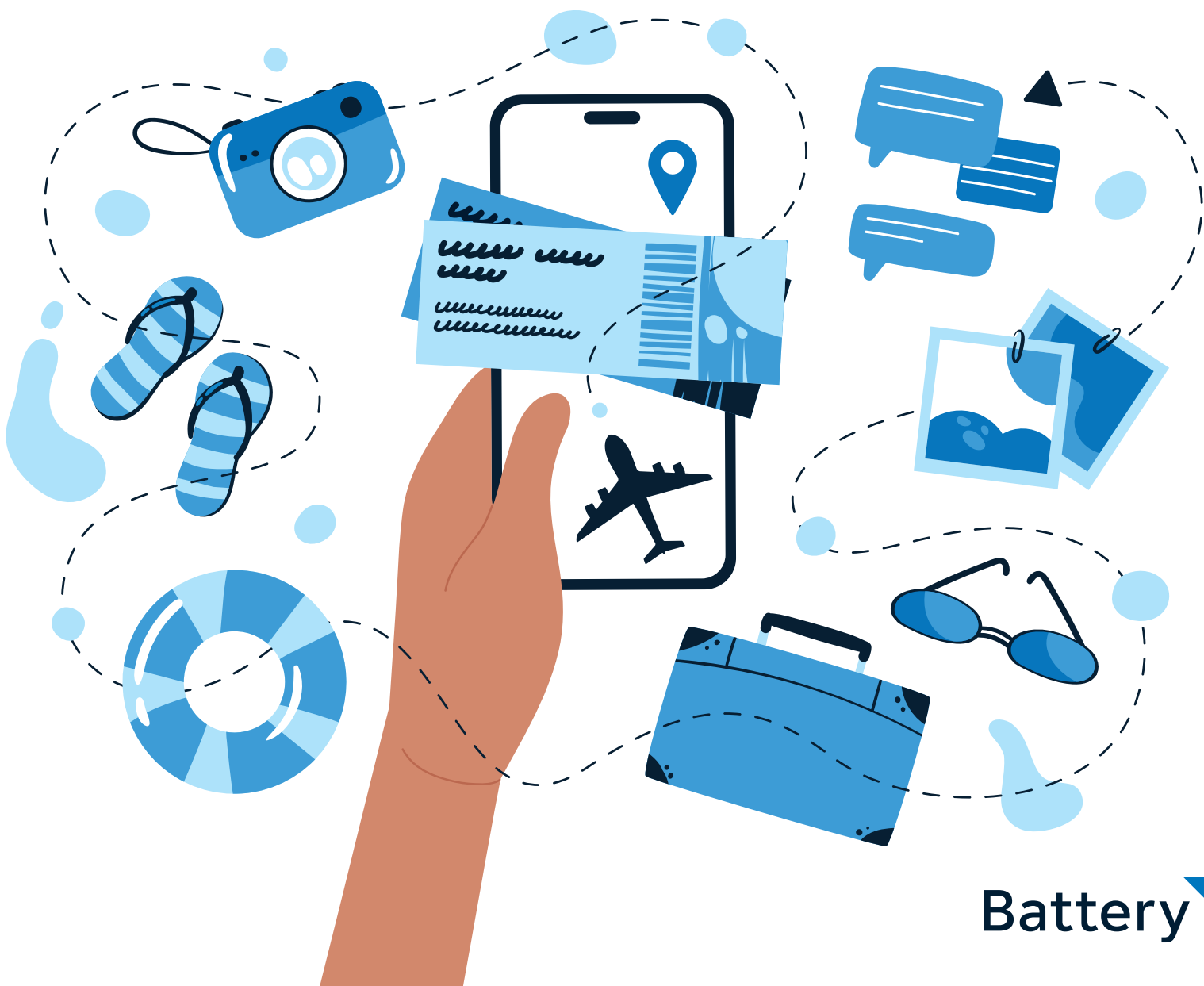


The CRO's Guide to Incentive Quota Clubs



RUNNING YOUR QUOTA CLUB

The joy of recognition! One of the many gratifying perks of the chief revenue officer role is the ability to give accolades and recognize achievement. And the best part of that role? Planning and running your quota club. Sometimes called Presidents Club, Achievers Club or Incentive Club, the “club” is typically an event. Quota achievers who hit a certain goal “qualify” to attend a recognition-focused trip or celebration.

Some of these events are more modest—like a nice dinner with the boss. For this guide, we’re going to consider our quota club to be a destination trip that recognizes success. The purpose is to help you plan and execute the best event your budget will allow! Remember: This is more than a company-funded boondoggle. These trips are critical morale-boosters for sales organizations and can lead to better sales performance—and more revenue for the company overall, which is always a good thing.

IN THIS BOOK, WE’LL COVER:

- 1. What a quota club trip is, and who qualifies**
- 2. Trip timing and naming considerations**
- 3. Agendas, activities and events**
- 4. Gifts and awards**
- 5. Budget considerations**
- 6. Pro tips**

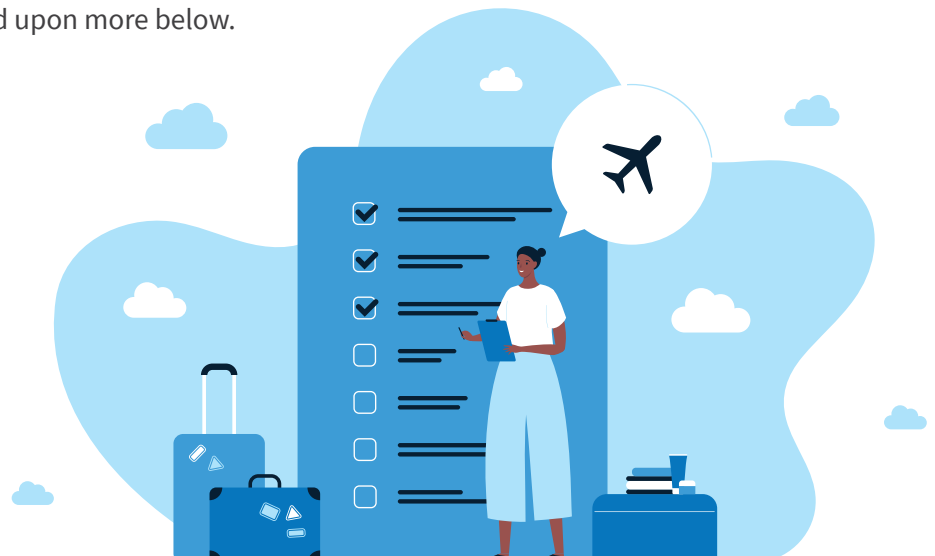
QUOTA CLUB HIGHLIGHT REEL

An exotic destination? Fun activities? Celebration? Awards? How about “yes” to all these ideas?

Many successful sales reps remember and talk about their multiple trips to quota club—they make that large an impression. The quota club is the culmination of a year’s work and a special reward that only a select few earn. We’re going to break down quota club best practices in detail, but let’s start with a “best of” reel of best practices to set the tone.

- 1** Make the qualification criteria clear and objective.
- 2** Center the agenda around time bonding as a group. Recognition and success are contagious, so try to maximize your time together.
- 3** Plus-ones should always be included; it’s not just an employee-attended event.
- 4** Come up with a branded name other than Presidents Club.
- 5** If you’re considering expanding/widening the invitation list, don’t do it. This event is also about exclusivity.
- 6** If this is the company’s first club trip, it’s totally fine to keep things modest (meaning maybe a car ride away from HQ as opposed to flights to Hawaii).

All these topics will be expanded upon more below.
So, let’s start at the top.



WHAT IS QUOTA CLUB, AND WHO CAN ATTEND?

Quota clubs reward sales team members for over-performing during a specified time period. The “club” is typically an annual event for your sellers who achieved a goal (commonly, 100% of quota for the fiscal year). This club is normally a trip to an exotic location with activities, gifts and recognition. And the club invite usually includes the qualifier plus a guest.

Before we go more deeply into qualification criteria, budgets and agendas for quota clubs, let’s address the elephant in the room: If you and your organization decide to create a quota club, you’ll likely get asked why this concept applies only to the sales org. It’s a totally legitimate question with an equally legitimate answer. Aside from the fact that software sales organizations have been doing quota clubs for decades, you should anticipate the inquiry of “Why does only sales get to attend? Why can’t [insert team here] attend the club?”

There is **ZERO** reason to be defensive or feel you have to justify the club trip. There are many reasons why, so let’s cover a few of them the main ones here:

1 Sales is the only team inside an organization on a highly leveraged compensation plan. Most sales reps earn 50% of their earnings in base salary and the other 50% based on their individual performance. Said another way, sales is the only team that risks the other half of what they earn based on their individual performance. Sales is an individual meritocracy, unlike most other functions that share group goals.

2 Not all sales members get to go on the trip. Plenty of reps only make, say, 86% of their quota for the year, and they don’t “earn” their spot. Be clear that being a sales rep may make you theoretically eligible, but not every eligible person will ultimately earn the trip. This is an elite group of performers (and let’s not lose sight that sales is the most metric-driven organization in the business. If you miss quota frequently, you’re liable to get fired).

3

Sales is the only role where performance is determined by someone outside the company. When development completes code, someone inside the company determines if the quality is good and if it's ready to go production. When marketing generates leads, it's someone inside the company who evaluates the quantity and quality. Sales is the only role where you need to get a legally signed document from an actual customer to meet success criteria.

Most teams understand this logic and become less passionate about their eligibility once they've heard the reasons. It's also worth noting that the sales team has to budget for quota club as well, so it's not just a "free" trip. It's a motivational tool for individuals who risk their earning potential and jobs and agree to be measured on a black-and-white objective every month or quarter.



BEST PRACTICE:

Carefully consider who is eligible to attend. This trip is earned.

How do you qualify?

Incentive clubs are designed around quota-carrying sales reps. That part is easy. But determining how a rep qualifies can be more difficult. The best practice is to set clear qualification criteria. It's common to set 100% of each rep's annual quota as the magic number for getting the golden ticket. This is the fairest metric because it rewards members who have done a full year's work and achieved the goal.

There are options other than 100%, but I don't recommend them. Some companies select a fixed number of reps to attend. This doesn't play well—instead of qualifying objectively, it becomes a stack rank. How would you feel if you sold 110% of your quota and still didn't make the cut? Or what if you, as CRO, planned, paid and designated 10 spots inside your organization, and only seven reps made greater than 100% of the quota? How does it feel to them when three people who didn't achieve quota get invited?



SCHOOL OF HARD KNOCKS

Mea culpa. I once overestimated how many sales reps would qualify and had a minimum number of rooms to fill. My solution: I'd send some people with less than 100% of their quota, starting with the next highest. The result was that people who sold 97%, 94% or 92% of their quota got to go.

Bad mistake! I should have taken my medicine and just eaten the cost of the rooms. A negative dynamic developed at the club between the group of haves (who earned their way there) and the have-nots (who were benefactors of bad planning). You could visually see the divided groups.

I'll never do that again. There was tension where there should have been celebration. I totally missed, learned a hard lesson and had to share the pain on an awkward, counterproductive trip. Don't do it. Only people who earn their slot get to go.

Some companies actually raise the bar and use a higher rate, like 110%, as the criteria to earn your slot. The justification is that it makes people work harder. I'm skeptical. Most sales reps I know don't work to hit 100% of their quota—they work to hit 120%, 150% or 200%. They work to make money first, and the quota club is an additional incentive.

Personally speaking, I don't align with the logic here. If you're a typical software sales organization, you likely have 50% to 60% of your team attaining 100% quota. That feels like a reasonable hurdle to me. To raise the bar even higher than 100% feels wrong. That said, I have seen companies create an elite-level club. Everyone who hits 100% earns the trip, but qualifiers above a higher tier, for example, 125%, get to the elite level. The elite level can be an add-on to the first club with additional days or a completely different location. Another way to recognize higher performance is with additional perks, like first-class airfare, upgraded rooms or more expensive gifts.



BEST PRACTICE:

Set your criteria at 100% of quota to earn the trip.

Who is eligible besides sales?

Okay, we know that quota club is primarily for sales. But the sales org also includes other quota-bearing and non-quota-carrying members, so who else is eligible?

Are the sales engineers eligible? What about sales management? Sales development reps (SDRs)? Sales and revenue operations? Marketing? Renewal and customer success teams?

My experience suggests that team members on high-variable commission plans, with the variable based on dollars closed, are natural contenders. To be clear here: Dollars closed is the key metric. This means account executives, sales managers and sales engineers are the first in line.

Account executives are obvious: They are the quarterback on the deal. Sales managers are a natural extension, as they manage the sales reps. Sales engineers are the next obvious group to me. While normally not on a 50/50 comp plan, they are often highly leveraged and their variable pay is based against how sales performs. All of these are legitimate roles for eligibility.

What about SDRs? Personally, this is a hard no for me. First, they aren't normally on a highly leveraged plan—it's likely 70/30 or 80/20. But if they are on a leveraged plan, SDRs are typically measured on leads qualified, meetings held and pipeline created. These are critical functions for the sales team, but it's not the same as getting an order form signed from a customer. Plus, most SDR teams hire people early in their careers who are on their path to sales. My advice: Let them first earn the sales role and then become eligible for the club. How does the sales rep who sold 93% of their quota and didn't qualify feel about the SDR who didn't sell anything and is basking in the sun in Hawaii? Not very motivating.

Every person who attends the event costs money, so the more people are deemed eligible, the more you use up your finite budget.



BEST PRACTICE:

Keep it tight! Invite only the people who really earned it on the trip.

BONUS TOPIC: Captain's picks

One idea I have seen executed well is having a few special picks who are not eligible but get selected to join the trip. This is subjective—it's normally company members who really contributed to the team's success.

My advice is to have these people be individual contributors or first-line management who are not in sales. Recognize the people, not the division that helped sales succeed. My process for this was to reach out to my sales reps or sales management team and tell them we had X number of spots for captain's picks. I'd ask them to nominate potential people and share why they should be selected. Then we'd look at those suggestions and make a call.



QUOTA CLUB TIMING

Another element to consider is quota timing. While setting the criteria for quota club, we need to determine how long a contender needs to be on quota to be eligible. While achieving 100% of a full, annualized quota is the most equitable policy, adjustments are common. When companies hire new sales reps within a fiscal year, they still want to motivate them with the ability to earn a quota club invite.

The best practice I've seen is to set a minimum for how long someone needs to be within the organization to be eligible. Many companies require new reps to be employed for a minimum of six months, and then they need to hit their ramped quota for that period. I've also seen derivations of this: A rep needs to be on board for at least six months but hit a full annual quota amount. The timing might be seven, eight or nine months to be eligible instead, before then achieving a ramped quota.

The reasoning for these policies is that it wouldn't feel great to be a tenured sales rep grinding for 12 months to make 101%, yet a new rep joins the org in September, sells for three months on a prorated ramped quota and earns the same trip.



BEST PRACTICE:

Determine the minimum amount of time a sales rep needs to be employed and what amount of quota needs to be sold.

Trip timing: Time of year

The other element of timing is: When do you actually plan and run the trip itself?

Know that whenever you plan it, it's disruptive. The trip takes a lot of high-performing players out of the work field, so prepare for productivity loss. Plus, since sales management are likely on the trip as well, that leaves people back in the office and field who are not actively supervised.

A lot of companies will plan their quota club trip early in their Q2. There are competing priorities in Q1. Reps are getting new territories and comp plans, they are attending company kickoff and that's all on top of Q1 being a seasonally lower bookings quarter. By Q2, the reps have settled in. Plus, it gives them something fun to look forward to.

Some companies will do it right after their company kickoff, feeling that the team is already out for a few days, so we may as well just continue from there. The reality is, any time you plan quota club, even if it's three nights and four days, you'll likely lose your reps for the whole week. If people are flying from their home city to the company HQ for kickoff and then flying from HQ to the quota club location—and then home again—it's a lot of traveling. And more travel comes with more opportunities for delays or cancellations.



BEST PRACTICE:

Quota club should stand alone and happen at a low-friction time.

Trip timing: Days of the week

What days of the week work best for your quota club? Take two things into account here: First, this is a work event, and second, as stated above, many of your qualifiers will extend their trip, either before the official start date or after.

Assuming you are hosting a three-night, four-day event, starting the event on a Tuesday or Wednesday works well. You're acknowledging that this is a work event but may also require some weekend travel. This also permits qualifiers to take vacation and go early or stay a day or two later after the official event ends.

I have seen some companies schedule these trips on Friday to Sunday. I'd suggest against that. It feels a bit petty and, more importantly, splits two separate weeks, which adversely affects business.



BEST PRACTICE:

Plan the quota club so your team is out a maximum of one work week.

THE NAME GAME

“Presidents Club.” Ugh. Most early-stage companies don’t even have a president, so I’m unsure why this name has stuck around. Whether it’s called Presidents Club, Achievers Club or Incentive Club—you can do better. Just like you theme your annual company kickoff or sales kickoff, you should brand your quota club.

It’s a fun way to designate the event and build some aura around it. Create the name, design a look and brand for it, and use that brand to demonstrate exclusivity. When people see your qualifiers wearing the new, cool, specially branded fashions, it creates a natural pull effect. Those who are eligible want to qualify and join, and those who aren’t eligible or don’t know what the club trip is will ask what that special brand means.



I REFUSE TO JOIN ANY CLUB THAT WOULD HAVE ME AS A MEMBER.

—Groucho Marx

In our second year at Marketo, the CEO and I conspired to create a quota club for our top sales achievers. Taking cues from my friends at Netsuite, who had branded their quota club as “Club Evil” as a nod to the Austin Powers character, Dr. Evil, I wanted ours to have its own moniker. I thought Club Evil was so cool. Having worked at many big companies with a boring Presidents Club, the idea that you could brand this event was itself novel. I searched the web for cool words around achievement, winning and performance. My first foray was Club Laurel—as in, don’t rest on your laurels. My CEO silently shook his head at that suggestion. Back to thinking about fresh ideas—when it hit me. Marketo’s corporate color was purple, a very regal color. It made me think about Ralph Lauren Purple Label, their exclusive high-end clothing line. That made me think about Johnnie Walker and their tiers of Black Label, Green Label, Blue Label, etc.—and bam—Purple Label Society was born. Everyone loved it, and it even turned into the acronym PLS. Naming rights complete!*



BEST PRACTICE:

Take the time and effort to create a distinct brand for your quota club.

AGENDA

A typical club agenda reads like this:

Arrival day

Morning and afternoon: Travel, transfer from airport to hotel, check into hotel room, head to pool or beach, relax

Evening: Company-hosted welcome with food and drinks

Second day

Morning: Optional breakfast for qualifiers and plus-ones, often followed by a speaker or activity for just the qualifiers

Afternoon: Group activity (golf, boat trip, scenic tours)

Evening: Dinner at leisure—nothing company-planned

Third day

Morning: Optional breakfast available between seven and 10 A.M.

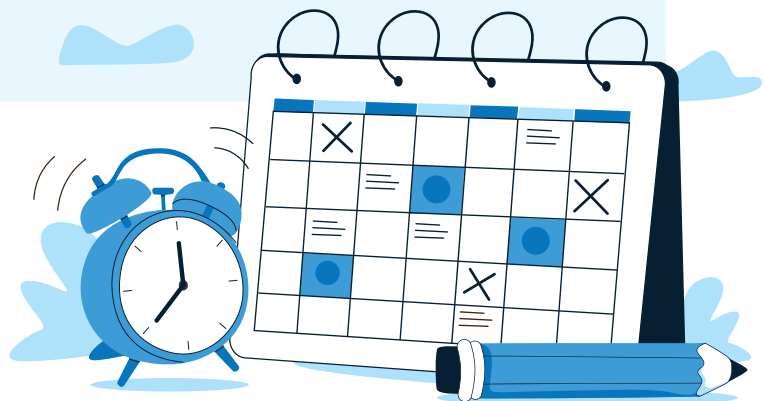
Rest of the day: Pool, beach and fun

Evening: Group dinner and awards banquet

Final day

Morning: Breakfast available

Rest of the day: Travel



Agenda details

Let's dive into the details of this potential agenda:

Day 1

Travel day. But as noted above, if your qualifiers decide to go early, they may have arrived already (and most hotels offer a discounted room rate before and after your club dates).

The first day is about the arrival and check-in process, so make it as easy as possible. A best practice is to choose a club destination that allows direct flights for the maximum number of qualifiers. Next is transfers from the airport. If you have a large group of people on the same flight, booking a shuttle makes sense.

Next is check-in. Always try to arrange a specific check-in for your group (no one likes to fly several hours, take a 30-minute bus and then wait 20 minutes to check in). Pre-arrange to have your room keys ready at the check-in time. If possible, have a dedicated desk staffed with someone from your company or travel planner at the check-in so no one has to wait in line. Lastly, have maps and printed agendas available.

After check-in, the team members will want to socialize before any evening activities.

QUOTA CLUB "HQ"

An absolute best practice is having a centralized hub or "HQ" where all attendees can meet. If you're at an exotic location, you can rent a cabana or private area near the pool and reserve it for the entire length of the trip. Additionally, stock it with water bottles, sodas, beers and suntan lotion. Make this location available to attendees from 8 am to 5 pm. A couple of benefits here:

- ✓ All people will have a place to go when starting their day or looking for other colleagues.
- ✓ Hotels, especially in exotic locations, charge a lot for basics like water bottles, suntan lotion and sodas (\$7 for a can of Coke, anyone?). So make this a non-issue—provide those for your team free of charge at HQ.

Evening

The first evening, you'll want to host a welcome reception. The best practice is to provide a full dinner. Remember, your attendees are celebrating and will be drinking. Don't skimp on food here: *Serve them a full meal.*

This is also a great environment to open the event, make announcements and start the celebration, so take advantage of the opportunity to welcome everyone and set the tone.

The party will continue after your welcome session, so determine if the company will cover the bar bill for the next stop (more on this below in the budget section).

MANDATORY VS NON-MANDATORY EVENTS

The club trip is about celebration, but it is a work event. It's important to telegraph which sessions are required versus optional. Unfortunately, I've seen first-timers come on the trip and miss every session and activity, thinking this was a company-funded vacation.

- ✓ Publish the agenda the week ahead of the club trip. Host a call for all qualifiers to walk through key details, organizer contact info (in case of travel challenges) and the agenda, including the attendance expectations for qualifiers and guests. Also, communicate clearly that this is a celebration trip, but it is still a work event. That means company policies still apply here. (Trust me—this is worth its weight in gold. Almost every sales leader who's been to a pro-level club trip has come home to find someone on the trip is “no longer employed at the company.”) Setting an expectation of professionalism is important.
- ✓ On the agenda itself, note whether each section is mandatory or optional for both the qualifier and the guest.
- ✓ Realistically, the welcome kickoff, the team activity and the awards dinner should really be the main required events. Breakfasts, etc., should mostly be optional so people don't feel over-scheduled during their few days on the trip. This is a non-issue—provide those for your team free of charge at HQ.

Morning

Booking a location in the resort and providing breakfast is a classy move. The best practice is to open around seven am for the early risers and let it run until nine or 10 am. That gives your attendees options: Are they the type to get up early and go to the gym, or are they sleeping in?

A lot of companies will host a work event to account for the trip for tax purposes. If that's the case, the best practice is to make this an easy meeting. Sometimes, it's a leisurely breakfast followed by a mandatory session for the qualifiers, perhaps from 10 to 11 am. Commonly, speakers are brought in to give a motivational talk. Another popular option is a team activity—it could be a conference room event, or it could be a physical activity off-site (i.e., a beach Olympics-style challenge).

It's smart to keep this tight. If the event separates qualifiers from their plus-ones, you'll want to minimize the time. Or, if your event is something like a motivational speaker or mental exercise, you can make it optional for the guests to join.

And as mentioned above, have your central cabana available all day so guests can mingle while not in the qualifier-only event, and everyone can socialize when the mandatory events are over.

Afternoon and evening

Many companies will sponsor and pay for a group activity, like a tour, a boat trip or a bike ride.

The best practice here is to do as much of this together as possible. There will be pressure to offer tee times for golf and spa treatments. These are common and perfectly fine, but note that these activities pull everyone apart. A big goal of club is for everyone to have the story of whale watching or snorkeling together.

A great practice for the evening is to leave this open for the employees to choose their own event. If they want to gather in small groups, they can do it. If they want to go off with their guest for a romantic night, they can opt for that. A consideration here is whether the company pays for this. We'll cover this in the budget section below.



Day 3

Morning

Lather, rinse and repeat the breakfast plan.

Morning and afternoon

This should be a day of fun. It's a great day to sponsor individual activities, like the spa or golf—remember, this is the night everyone will come together for the awards celebration.

Once again, have your cabana open and well-stocked.

Evening

The big night! Awards night! Prepare to create a wonderful evening that attendees will remember for a long time.

The best practice here is to start with a cocktail hour with passed appetizers. You may want to have a company-themed drink at the bar. Another good idea is to provide some music, like a DJ or band for background ambiance. Consider a photographer to take pictures of the qualifiers and their guests and to capture the rest of the night.

Dinner should be a grand event. It should be a celebratory meal—lobster and steak or something similar. Good food and good drinks. I've witnessed some companies host some fun options like tastings of specialty foods (caviar, dumplings, etc.) and booze (bourbons, rums or wines). Just be careful on the liquor side.

After dinner comes a recognition event. This can be as simple as recognizing everyone by their performance ("I'd like to call out Jacki at 101% of her quota...") to more personalized storytelling about each person. Just know this: Every qualifier will hang on every word that comes out of your mouth, and every guest will look at their partner in admiration. This part is important, so spend some time here and make it special.

Also, think about the awards. You can hand out trophies, marble pucks, etc. These are okay, but I can tell you that I have a box full of these in my garage collecting dust. So, "unique and special" rules the day here: I advise budgeting and planning for something unique (for example, engraved mini outrigger paddles if you're in Hawaii).

In addition to awards, I'm a big fan of handing out a high-end gift to both the qualifier and the guest. For the qualifier, maybe a customer money clip, key chain or bracelet. For the guest, something of similar value.

How you recognize the spouses and partners of your qualifiers is another important consideration. It's classy to reserve some time to call out the support their partners provide and dedicate a toast to them. This makes them feel valued for their role in their partners' success.

THE SILVER-PLATED AWARDS

At one quota club, I had high-quality money clips customized with the company logo for the men and Tiffany bracelets for the women. The gifts were nice, but the presentation is what made them really special. Right after I finished the last award and hosted a toast, the entire server staff came out with silver serving plates filled with the boxes, walked around to each person and had them select one of the gifts. It was very cool to see all these servers with stacks of blue Tiffany boxes.

I've also concluded an event like this, especially if it's outside, with fireworks, if the budget allows. It's wonderful to finish the speeches and then walk under the night sky to see fireworks.

Party time! Now is the final celebration time. People will have been sitting, so I suggest something fun that gets people moving. The obvious choice is a DJ or band that gets everyone dancing—always a winner. I've seen a casino night as a great option, too. I've also seen themed rooms where attendees move at their discretion to rooms full of local merchants (especially if in Mexico or the Caribbean), rooms where they can paint their own masterpieces or rooms with different shopping experiences where vendors sell all kinds of items.

Late evening

One best practice here is to bring out some late-night food. If your cocktail hour, dinner and awards ran from six to nine pm, I'd suggest bringing out some comfort food around 11 pm to help them get more food intake!



BEST PRACTICE:

Prior to arrival at your hotel, arrange a dry run of the actual agenda with the resort team. If possible, include the hotel food and beverage manager and events manager, as well as any company team producing your event. Usually, this walk-through happens on "day zero," i.e., the day before everything starts. Since a lot of this agenda was likely planned remotely, this is a great idea.

SWAG, GIFTS AND ROOM DROPS

The power of the gift! Many quota club attendees return with a variety of branded swag—hats, t-shirts, backpacks, water bottles, etc. When registering for the event, the questionnaire can include size and color preferences to customize gifts to each attendee. These are fun, fairly inexpensive ways to make the event memorable. But what really locks in the memory is how the attendees receive the gifts. Cue the art of the room drop!

Room drops are when the attendee comes back to their room, perhaps after a meal or an event, to find the company-branded swag awaiting them. Picture the scenario: You arrive, check in and then go to the welcome reception. After good food and drinks and some socializing, you and your guest return to the room to find a goodie bag awaiting. That will always bring a smile!

I've seen room drops be fruit and wine, fun local items like chocolates or cultural gifts and, of course, the requisite stuff like t-shirts, hoodies and flip-flops. Another option I've seen that works really well is a gift "pop-up shop." There is where each qualifier gets to pick between a bunch of different swag, like sunglasses, digital cameras, etc. This creates a fun environment that brings everyone together to go shopping and get their gear.

Swag can also arrive ahead of the actual trip. I often see this when the box of goodies includes expensive gear like cameras and sunglasses, and the trip is scheduled in a foreign country. I've unfortunately been the poor sucker standing at customs with a wad of cash, paying the "special duty" that's been imposed on my gear. But don't forget about leakage when it comes to some exotic destination deliveries—I once received only about 75% of the cameras we shipped to the destination.



BEST PRACTICE:

Receiving the gifts on-site is really fun, and spacing your gift deliveries across the event creates a lasting memory.



BUDGET

Let's dive into the costs of hosting a trip. I've seen club trips as modest events that are a car ride away from the HQ and incredibly lavish trips to expensive, remote locations.

A few big-budget areas you'll want to determine are transportation, hotel, food and beverage, activities and gifts.

BUDGET ITEM	COST PER PERSON	NOTES
Airfare	\$1000	
Airport Shuttles	\$250	Not including transportation to off-site events
Hotel	\$500–1000 (per night)	\$2,800 for 3 nights, including taxes and resort fees
Welcome Reception	\$200–300	
Breakfast	\$50–75	
Celebration Dinner	\$300–400	
Activities	\$300–400	
Gifts	\$300–500	Not including the cost to ship the item to the destination

These are estimated 2025 prices and are liable to fluctuate depending on the time of year and location you select.



BEST PRACTICE:

Whatever you budget, the event price will come in 15% to 20% higher. The amount of fees will surprise you—from resort fees to gratuities you didn't expect. Be ready for the extra costs. But also know you can execute a great event on a tighter budget.

PRO TIPS

Agenda details

I remember being a kid and my dad receiving a box at home. In the box was a bottle of suntan lotion, a book on Hawaii and some macadamia-nut cookies. I asked what this was for, and my father explained that he was going on a business trip to Hawaii and this box was meant to generate some excitement before the event. Aside from my personal excitement, even though I wasn't going on the trip, my mom loved it.

A teaser is something you can send before the trip to get the qualifier and their guest excited for what lies ahead. It's a classy move, and it can be themed to the location.



BEST PRACTICE:

Create sizzle for your event with a small token before the trip. Something simple, like branded luggage tags and a nice note sent to the qualifier's home, makes a big impact.

Consider outsourcing registration

Once you've decided to do a club trip, you'll want to determine if you will handle logistics internally or hire a professional events firm.

The pro of outsourcing is that these firms can give you real-world feedback on the locations you're looking at, make suggestions on the best activities and even provide a registration system (in addition to handling all travel). The con is the cost—they normally get kickbacks from the hotel and vendors they work with in addition to the fee they charge your company (which can be 20% to 30% of your budget).

My experience suggests that a blend makes sense, especially for earlier-stage companies. You don't want to handle all the flight and travel work, so hiring an event or travel company to do that is a tremendous time saver. But your company can handle the other details—swag, event planning, etc.

One challenge to consider is registration. Getting info from your qualifier and their guest can be tricky. All the relevant data like legal name, address, birthdate are commonly required, plus frequent flier numbers, dietary restrictions, etc. A good travel planner can make this part easy.

One other thing. I've hosted events in Hawaii, with attendees from New York coming. Because they're already on one Hawaiian island, they want to extend the trip to another one (like Maui). This can make planning more difficult, both for costs and logistics. My solution is to explain that the company is paying for and booking for your flights to and from the club destination—you handle any other flights and changes.



BEST PRACTICE:

Before you decide to manage this internally, really think about whether you're prepared to handle flights, hotels, transfers and details down to what size t-shirt someone wears. It's a lot of work!

Take a site tour

It's a dirty horse, but someone's gotta ride it! Normally, when you select a destination, you may have one or a couple of hotels to evaluate. One of the most fun aspects of quota-club planning is the site tour. And while it's fun, getting on-site before booking is also vital. Website pictures look wonderful, but someone from your team needs to land on the ground and do a walk-around.

The purpose of a site tour is to make sure the resort and space will work for your plans. These hotels do such tours nonstop, so they're pretty accomplished at executing them. But you will want to inspect the rooms, the restaurants and the event spaces. Also plan to see the different spaces where you can host your welcome reception or your celebration, for instance.



BEST PRACTICE:

Don't skip the tour! Someone from your team should make the trip.



Pick a strategic location

There are so many good places to host your club. In North America, the popular locations are Hawaii, Mexico, the Caribbean and Costa Rica. In Europe, destinations like Spain, France (Paris and the south of France), Italy and Greece often come up. In Asia, Bali is very attractive.

If you're budget-constrained, think about popular places your team can reach by car or train to cut out the extra cost of flying.

In choosing your destination, most companies start with something nearer to the headquarters location. For example, if you're headquartered in San Francisco, it's likely that Hawaii or Mexico will be high on the list (or if you're more budget-constrained, San Diego, Palm Springs and Las Vegas might be destinations). One consideration is where most attendees will be traveling from. Ideally, you don't want the majority of your travelers flying from Boston to Hawaii—there are easier locations.



BEST PRACTICE:

Choosing a location that allows for direct flights makes planning a lot easier.

The things you don't know until you know

Okay, here are some miscellaneous tips to share to make your pro-level event run smoothly.

Sizes and gifts

If you can, avoid giving gifts away that require different sizes (t-shirts, pullovers, flip-flops). You need to collect sizes from everyone before the trip, and then there are always changes or mix-ups, so someone gets left with the wrong size.

If you can give away things like one-size-fits-all hats, backpacks and water bottles, it makes your (planning) life a lot easier.

Photographer

The resort will offer to hire a photographer for your events. If you have the budget, do it—especially for the welcome reception and awards night. After the trip, I've seen photo books assembled and given to all the attendees. It's a classy move.

Expectations

Unfortunately, there's always that one employee who forgets that this is a work event and behaves inappropriately, perhaps leading to disciplinary action back at HQ. It's a terrible way to end a trip and, possibly, your employment with the company that just sent you to Hawaii.

Prior to the trip, I suggest hosting a mandatory call for all qualifiers. In the call, be clear that while we're there to celebrate, this is a work event, and as such, work rules apply. Set expectations that everyone needs to:

- 1** Attend required events
- 2** Be professional with both fellow employees and guests
- 3** If they drink, drink responsibly

And, importantly, their plus-one is their guest and their responsibility. All the same levels of decorum and professionalism apply to them, too.

The actions of one qualifier can have lasting impacts, so the reinforcement of professionalism is a good move.



Double qualifying

This is a tricky topic. Consider establishing policies and including them in your “rules of engagement” document prior to your event.

Take a few double-qualifying scenarios:

Scenario 1

Your best rep, Rebecca, qualifies for quota club but doesn't have anyone she can bring. She offers her guest spot to her SDR, Jill, who works for your company. Jill is not in a quota club-eligible role, but she gets invited when no other SDRs are going. Do you allow an employee in an ineligible role to attend?

Scenario 2

A more common scenario is two of your account executives are dating each other. One of them qualifies for the trip; the other doesn't. The qualifier wants to bring their significant other. A guest gets to come enjoy the celebration, yet they're not really a guest but an insider who didn't earn their spot.

Scenario 3

Two account executives are married. They both qualify for the trip, and they ask one set of their parents to come along as their plus-ones (each gets a plus-one). Now your company celebration just turned into a family reunion.



BEST PRACTICE:

Establish rules around these situations before they occur. Decide how loose or tight you want this to run (and yes, I have personally seen each of these situations arise).

Running a successful quota club is a lot like planning a wedding—you're deciding between chicken wings and chicken fingers. It's detailed and difficult work but worthy for the glorious cause.

Good planning!



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