Unify the Efforts of Marketing & Sales Through Marketing & Sales Service Level Agreements
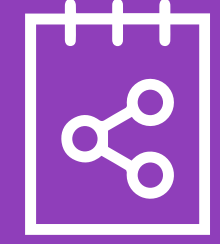
REVHEAT

|	MARKETING TEAM	SALES TEAM	SHARED TASKS & GOALS
GOALS	**EXAMPLE GOAL:** • # of qualified leads needed to support sales quota	**EXAMPLE GOAL:** • Sales quota • Number of deals • Number of discovery calls	**EXAMPLE GOAL:** • Company revenue goal • Company goals for new business and existing business revenue
METRICS	**EXAMPLE METRICS:** • Monthly average of leads generated by marketing • Total Revenue close from marketing-generated leads	**EXAMPLE METRICS:** • Sales closing rate (average lead-to-customer conversion or close rate) • Quality of close customers	**EXAMPLE METRICS:** • Average lifetime value of a customer • Average length of customer engagement • Revenue from closed customers

LEAD QUALIFICATION	**EXAMPLE QUALIFICATION:**
	• Target persona(s)
	• What qualifies a MQL?
	   ○ What title?
	   ○ What actions?
		EXAMPLE QUALIFICATION:
		• Lead's budget, sense of urgency, timeline, etc.
		• Do they need to be ready to buy today or would in the next 6 months work?
			EXAMPLE QUALIFICATION:
			• Lead scoring
			• Quality of leads
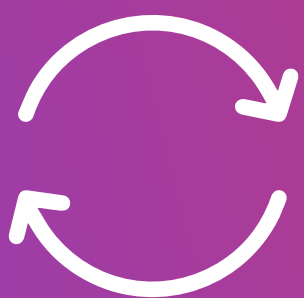
LEAD HAND-OFF	**KEY QUESTION:** • How will marketing notify sales of a lead's readines? • Which part of the handoff can be automated? • How much information should be provided to sales?	**KEY QUESTION:** • How will sales notify marketing that a lead needs more nurturing? • What are the specific actions sales must take and by when?	**KEY TRIGGERS:** • BOFU conversion • Marketing assessment • Demo request/consultation
LEAD NURTURING & MANAGEMENT	**EXAMPLE STRATEGIES:** • Educational content • Effective CTAs • Automated workflows	**KEY QUESTION:** • What can sales do/trigger? • What is sales' plan for contacting leads? • How much time is there between each contact attempt?	**KEY QUESTION:** • What information needs to be gathered abut leads? **EXAMPLE STRATEGY:** • Define ideal customer/lead challenges and highlight those in communications
GOALS REPORTING	**KEY QUESTION:** • Who can sales contact on the marketing team? **EXAMPLE REPORT:** • % revenue from marketing-generated leads	**KEY QUESTION:** • Who can marketing contact on the sales team? **EXAMPLE REPORT:** • Weekly status reports on sales pipeline	**EXAMPLE REPORTS** • Monthly meeting • Monthly report email • Regular updates to SLA

✉ EMAIL US   📞 SCHEDULE A CALL