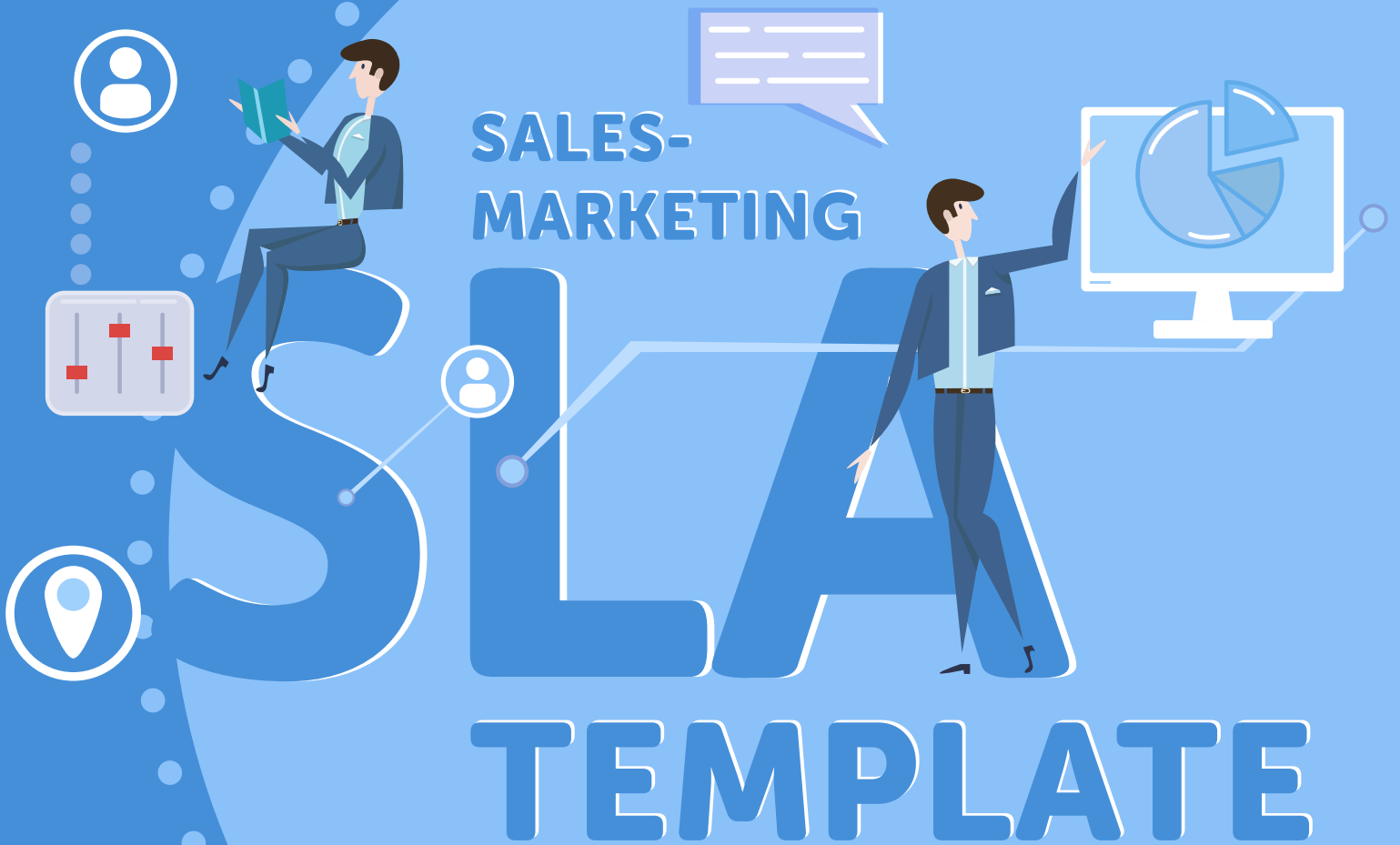


**BLULEADZ**



Aligning Your Sales and Marketing  
Departments to Crush Your Goals

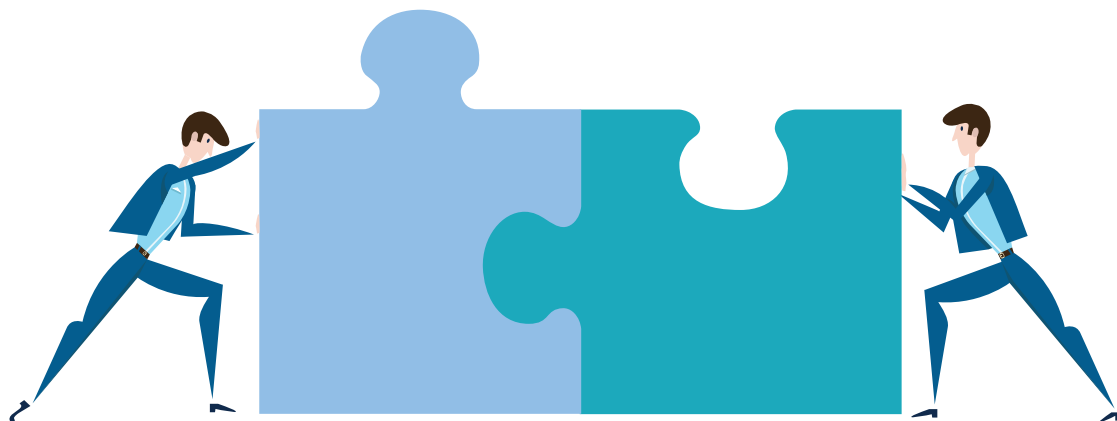
# WHY ALIGNMENT MATTERS

Sales and marketing alignment, known as smarketing, has become essential in the digital world. If your company is suffering from silos that divide teams, you're not going to hit your business goals.

Unfortunately, alignment is still quite uncommon. Research sheds light on this dire situation:

- 43 percent of sales and marketing professionals said "lack of accurate/shared data on target accounts and prospects" was their biggest challenge for aligning sales and marketing departments.
- Only 26 percent of professionals say they use an SLA and are tightly aligned between sales and marketing.

To break down your silos and get sales and marketing working together and to maximize the force through every flywheel stage, you need a sales-marketing service-level agreement (SLA).



# WHAT IS AN SLA?

A service-level agreement is usually used to define what a customer gets from a service provider. But in terms of smarketing, an SLA details marketing goals and sales activities that will follow and support those marketing goals.

Ultimately, this agreement clarifies how many quality leads marketing should be delivering per month and delineates how sales will follow up with these leads. With clear goals measured by concrete numbers, the success of your smarketing efforts is defined.

More importantly, this document is a commitment – a commitment from both teams to support each other. And what makes it so impactful is the focus on concrete goals.



# HOW TO ALIGN MARKETING AND SALES ON KPIS AND GOALS

## 1. Gather Your Teams.

This isn't just simply getting your employees to sign a document. You're looking to get full buy in from everyone involved.

Help sales and marketing team members get in the right mindset so they happily contribute and collaborate while you create your agreement.

## 2. Define Your Channels and Personas.

Before diving into the nitty gritty details of close rates and lead value, you need to break down your leads by both the source your leads are coming from (the channel) and what kind of lead you're attracting (the persona).

Why does this matter?

Because if you're a B2B industrial organization and you sell products and services to businesses of all sizes, your small company close rates might be way lower than big company close rates. Plus, a lead who finds your website through Google (organic channel) costs you less than those who click on your paid advertisement (paid media channel).

Plus, a lead who finds your website through Google (organic channel) cost you less than those who click on your paid advertisement (paid media channel).

To put it simply, not all leads are equal. Here is a list of defined channels to keep in mind:

Organic – leads coming through search engines.

Email – leads generated through email campaigns.

Paid media – leads coming from digital advertising and PPC campaigns.

Social – leads that are attracted through social media.

Sales rep call – leads that come through sales rep outreach.

Then, make sure you have your buyer personas at the ready. You're going to need them for both teams to understand what a good fit customer looks like.

### 3. Crunch Your Numbers.

Both sales and marketing need to come prepared with some research and metrics. You might need to sort through various resources you use for sales and marketing analytics, such as your CRM and marketing automation platform.

Here are the metrics you need to consider calculating:

**Use this [SLA metrics spreadsheet](#) to organize your KPIs if you plan on including them in your SLA.**

#### Sales Closing Rate

What percentage of your leads ultimately became customers?

Review the last six months of sales data to find how many marketing leads were generated from each channel.

This is your average close rate, which you need to add to each channel and continually update monthly.



## Lead Value

How much is each lead worth in dollar amounts from each channel and for each persona?

Each persona and each channel will generate leads of varying value. Review your sales and marketing data to first find the average sales price for each persona.

Add the average sale price to the respective persona. Then, multiply the average sale price by the sales closing rate percentage for each channel. Ultimately, you will find the dollar amount value for each persona and their respective channels.

Update the average sales price every month.

## Leads Generated Monthly

How many leads are coming through each of your marketing channels on a monthly basis?

Dive deeply into your marketing analytics to see how many leads are coming through each channel. Attribute this amount to each persona as well.

Update these numbers as much as you can because lead generation can change on a regular basis. Once you add leads generated for each channel and persona, total them up so you can identify the lump sum of all leads your marketing efforts are delivering.

With all these metrics in mind, you can determine how many leads are coming in through both marketing and sales channels, the percentage of those actually closing, and the dollar amount of each of those closed deals.





## 4. Align Your Numbers With Goals.

It's important to think long term, so start to set revenue goals. With this big picture goal in mind, you can work backward to see how many leads are needed. Collaborate with your sales team and leadership to determine overall revenue goals.

Then, break them down for each persona and channel.

Finally, calculate how many total leads you need to generate to reach your revenue goals.

For example, if you have a monthly revenue goal of \$50,000, break down how many marketing leads you need from each channel and persona to reach that goal. So, let's say you bring in 1,000 leads associated with your first persona, who's average sale price is \$500. You would need 100 deals to close.

In terms of channel, let's say their close rate is 50 percent through email. So to hit your \$50,000 revenue goal, you would need to generate 2,000 qualified leads associated with the first persona through email. Because of those 2,000 leads via email, you can count on closing 1,000 deals at roughly \$500 per sale.

## 5. Define Important Items.

Your team needs to agree on what constitutes a marketing qualified lead (MQL) and a sales qualified lead (SQL). Encourage marketing and sales to review other important terms and definitions, including reasons for rejection and remarketing leads.

## 6. Create a Lead Handoff Process.

Remember, this isn't written in stone. Prepare to update this as needed, but in the meantime, you need a process for handing off qualified leads from marketing to sales. Then, describe the activities they take after the handoff.

# YOUR SERVICE- LEVEL AGREEMENT TEMPLATE

We are going to walk through the nitty gritty for each section of your SLA, including your summary, definitions of leads, expectations for both your marketing team and your sales team, and signatures from key players.

After you fill out each section, you can distill the essential information and add it to your blank SLA template at the bottom of this guide. Use this completed template as your piece of collateral to distribute to your team members.



# The SLA Summary

This is where you briefly describe what the marketing and sales team is agreeing on within this document.

## Exercise:

Number of leads that marketing will provide to sales each month	<input type="text"/>
The rate of disqualified leads from leads to MQLs	<input type="text"/>
The number of MQLs being passed to sales	<input type="text"/>
The percentage of MQLs that sales is expected to close	<input type="text"/>
The amount of new clients you will earn per month as a result of this SLA	<input type="text"/>

## Document Text

This agreement is a service-level agreement (SLA) between [Company Name] sales team and marketing team.

This agreement is valid from the effective date outlined herein and remains valid until further notice. Reviews of this should happen [Frequency of Review]. The current agreement remains in effect in lieu of a review.

This agreement is valid until it's superseded by an updated agreement that is endorsed by the stakeholders.

### Stakeholders

The following personnel will represent the primary stakeholders associated with this SLA:

[LIST JOB TITLES HERE]

### Roles

Both sales and marketing have their own set of responsibilities, as outlined below:

Marketing

[LIST RESPONSIBILITIES]

Sales

[LIST RESPONSIBILITIES]

### The SLA Summary

The marketing team is committed to generating [X] leads per month. Assuming a DQ rate of [X] percent, they're expected to deliver [X] MQLs. The sales team is expected to earn a close rate of [X] percent of the MQLs being handed off from marketing. This equals at least [X] new customers/clients

# SLA Definitions

Each business defines their SLA terms differently. You need to define what your teams consider a lead, a marketing qualified lead, and a sales qualified lead.

## Exercise:

• •

• **LEAD**

• List what details your marketing team needs

• to define a website visitor as a lead.

• 1.

• 2.

• 3.

• 4.

---

• **MQL**

• List the details associated with leads that your

• marketing team can qualify.

• 1.

• 2.

• 3.

• 4.

---

• **SQL**

• List the characteristics that MQLs must show

• to become qualified by your sales team.

• 1.

• 2.

• 3.

• 4.

• •

## Example:

### LEAD ATTRIBUTES

1. Company name
2. First and last name
3. Work email

### MQL ATTRIBUTES

1. Organic channel
2. Social ads
3. Positive lead score
4. Attended a webinar

### SQL ATTRIBUTES

1. Right budget range
2. Relevant pain point
3. Contacted sales team directly

### NOTE:

Depending on your team and sales process, you can also provide other definitions, such as:

Rejected MQL – sales reviewed an MQL and determined that the timing isn't right.

Remarketing lead – sales reps reassign SQL or MQL to marketing as a remarketing lead so the lead can be further nurtured by marketing.

## Document Text

This agreement supports the following definitions:

- Lead – [write your definition, including the listed attributes]
- Marketing Qualified Lead (MQL) – [write your definition, including the listed attributes]
- Sales Qualified Lead (SQL) – [write your definition, including the listed attributes]
- Add other definitions that you need.

# Marketing's SLA to Sales

This section is where marketing describes their accountability to the sales team.

## Exercise:

Marketing will provide this amount of MQLs to sales each week

---

How this goal will increase within the quarter

---

Marketing will provide reports as follows

## Example:

- Marketing will provide 50 MQLs to the sales team each week
- The goal of the marketing team is to increase to 75 MQLs by end of Q3
- The marketing team will provide weekly MQLs reports as well as monthly MQLs forecasts

## Document Text

Marketing is accountable for [X] MQLs to sales every week. They're aiming to increase to [X] MQLs per week by [date or quarter].

Marketing will provide [frequency] reports detailing [KPI]. At [timeframe], they will also present forecast reports estimating [type of lead your sales development team needs a forecast report for].

# Sales's SLA to Marketing

You want to get your stakeholders involved to understand how many new customers or clients you need to hit your revenue goals. This section outlines sales actions and metrics they're committing to in an effort to close the amount of customers needed to achieve big picture objectives.

## Exercise:

Response time to reach out to an MQL	# of MQLs disqualified (DQs)	<input type="text"/>
<input type="text"/>	# of MQLs passed to sales (SQLs)	<input type="text"/>
Sales action for disqualifying a lead	MQL to SQL conversion rate	<input type="text"/>
<input type="text"/>	# of SQLs disqualified by sales	<input type="text"/>
How sales confirms lead source	Estimated customer value of SQL (forecast)	<input type="text"/>
<input type="text"/>	# of SQLs closed into customers	<input type="text"/>
	Revenue value of SQLs closed as customers	<input type="text"/>

## Document Text

The sales team is committed to contacting MQLs within [X] minutes after the MQL is received. When MQLs are disqualified, sales will [action to mark them as DQ in CRM], then [marketing action to nurture the DQ].

Sales will identify lead source by [action].

In addition, sales is holding themselves accountable for the following KPIs:

- Number of MQLs disqualified (DQs) - [X]
- Number of MQLs passed to sales (SQLs) - [X]
- MQL to SQL conversion rate - [X]%
- Number of SQLs disqualified by sales - [X]
- Estimated customer value of SQL (forecast) - \$ [X]
- Number of SQLs closed into customers - [X]
- Revenue value of SQLs closed as customers - \$ [X]

# Signatures

Now, both teams are ready to review the final SLA and sign the document.

## Exercise:

- Encourage both teams to carefully read through the document before signing and dating the document. Also, confirm a frequency in which you want to revise and update your SLA. This can be quarterly or annually.

## Document Text

Marketing Team

- Signature
- Signature
- Signature

Sales Team

- Signature
- Signature
- Signature

Date Signed: [date]

There you have it! Your SLA is completed. Now, simply distill the essential information from each section above and add it to your blank template.

[CLICK HERE TO DOWNLOAD THE TEMPLATE](#)

Distribute this completed template to each team and use it as reference to keep your marketing and sales team aligned on a daily basis. They can hold each other accountable and ensure you continue to hit your revenue goals and grow your business.