

Sales and Marketing SLA Template

Agreement Overview

This Agreement represents a Service Level Agreement ("SLA" or "Agreement") between (company) Sales team and (company) Marketing team on the lead management and lead qualification process. This includes lead status, lead stage, and lead funnel definitions as well as the marketing to sales lead handoff criteria and the sales acceptance and rejection criteria.

This Agreement remains valid until superseded by a revised agreement mutually endorsed by the stakeholders.

This Agreement outlines the parameters of all lead management processes covered as they are mutually understood by the primary stakeholders.

# Goals and objectives

The purpose of this Agreement is to ensure that the proper elements and commitments are in place to facilitate a flow and acceptance of qualified leads to sales.

The goal of this Agreement is to obtain consensus for the lead qualification criteria and lead handling between the Marketing department and the Sales department.

**The objectives of this Agreement are to:**

* Provide clear reference to lead ownership, accountability, roles and/or responsibilities.
* Present a clear, concise and measurable description of lead qualification, acceptance, disqualification and nurture.
* Match perceptions of expected lead quality with actual lead quality and delivery.

#

# Stakeholders

The following Marketing and Sales personnel will be used as the basis of the Agreement and represent the primary stakeholders associated with this SLA:

Global Sales Team

Global Marketing Team

**High level responsibilities:**

# Marketing:

* Create brand awareness
* Generate leads
* Score leads
* Nurture leads
* Handoff marketing qualified leads to BDRs

# Sales:

* BDRs qualify leads for Sales Execs
* Sales Execs further qualify MQLs, either accept or reject them
* Converts SQLs to opportunities
* Adds primary contact information to opportunities
* Wins deals
* Regularly provides marketing with feedback on lead quality

# Periodic Review:

This Agreement is valid from the Effective Date outlined herein and is valid until further notice. This Agreement should be reviewed at a minimum once per fiscal year; however, in lieu of a review during any period specified, the current Agreement will remain in effect.

The head of marketing ("Document Owner") is responsible for facilitating regular reviews of this document. Contents of this document may be amended as required, provided a mutual agreement is obtained from the primary stakeholders and communicated to all affected parties. The Document Owner will incorporate all subsequent revisions and obtain mutual agreements/approvals as required.

(Name)

Review Period: Bi-Annual (6 months)

Previous Review Date:

Next Review Date:

# Lead qualification:

The following detailed service parameters are the responsibility of the lead qualification process in the ongoing support of this Agreement.

**Prospect Lifecycle Stages**: Designed to designate where contacts are in the marketing funnel. Each stage represents a transition down the funnel. Stages are also used for appropriate content mapping to complement the buyer’s journey.

**The following are the lifecycle stages in the lead funnel:**

**Prospect or Lead**: Contact submitting a TOFU/MOFU form or list imports (tradeshow leads) 0-49 (depending on your MAP this can be two stages: Subscriber 🡪 Lead)

**Marketing Qualified Lead (MQL)** – Contact submitting BOFU form (demo) or any lead with a completed data profile and lead score reaches the MQL threshold 50-74.

**Sales Qualified Lead (SQL)** – Agrees to demo 75-99

**Opportunity** – an accepted SQL that attended a demo and is moving on to proposals.

# Lifecycle Stages (may vary):

**Subscriber: (score 0-24):** Think of subscribers as those folks who know about you and have opted in to hear from you periodically. In many cases, your subscriber base is the segment of your contacts database that has only signed up for your blog or newsletter and nothing else. You should nurture a long-term relationship with subscribers and offer them content that will increase the chances that they will move forward in the customer lifecycle.

**Lead (score 25-49):** Leads have shown more interest in what you offer than subscribers have. Typically a lead has filled out a form with more than just an email address, often for some sort of content-based offer on your website. We see companies use the lead lifecycle stage for what we think of as general, broadly appealing, or top-of-the-funnel offers. As each lead demonstrates a higher degree of sales readiness and qualification, they will move to further stages.

**Marketing Qualified Leads (MQLs) (score 50-74):** Marketing Qualified Leads, commonly known as MQLs, are those people who have raised their hands (metaphorically speaking) and identified themselves as more deeply engaged, sales-ready contacts than your usual leads, but who have not yet become fully fledged opportunities. Ideally, you should only allow certain, designated forms to trigger the promotion of a lead to the MQL stage, specifically those that gate bottom of the funnel offers like demo requests, buying guides, and other sales-ready calls to action.

**Sales Qualified Leads (SQLs) (score 75-99):** Sales Qualified Leads are those MQLs that your BDRs have qualified, have agreed to a demo and have been accepted by the sales executive. Using this stage will help your sales and marketing teams stay firmly on the same page in terms of the quality and volume of leads that you are handing over to your sales team.

**Opportunity:** Opportunities are contacts who have become real sales opportunities in your CRM.

# Lead qualification flow (create based on org process):



# Lead status definitions (may vary for each org):

**New:** Not in system - Not new to CRM database but no marketing activity or sales rep activity has ever been logged;

**Attempting:** Calls and Emails are being attempted, but they have not reached contact

**Contacted:** The lead has been engaged but still trying to determine if there is a fit

**BDR Qualified:** "A BDR has identified that there is potential for business due to the following criteria (may vary):

a) Decision maker or Champion has been reached

 AND

b) A need has been identified

 OR

c) There is an incumbent

 OR

A budget has been identified"

**Sales Accepted:** is when sales team member has accepted BDR qualified lead (SQL) and has deemed the lead worthy of additional follow-up. This also can trigger a change in lifecycle stage to SQL to ensure accurate enrollment in appropriate email nurture streams for the stage.

**Disqualified:** Not a good fit and no further activities should be logged.

**Do not Contact:** Lead has requested no contact

**Future Follow-up:** Good fit for our company, but not ready to buy. Put in nurture funnel and create follow-up task for 90 days. If lead is re-engaged, rep is free to contact them prior to that.

A BDR or Sales Director can re-assign an MQL or SQL to Marketing by changing the lead status from Qualified to Future Follow-up. Re-Market leads will be sent back to marketing for further nurturing and they will have points reduction to their lead score.

**Archive:** The contact is radio silent – If lead is still engaged with marketing emails – Enroll in MOFU nurture track.

#

# Lead scoring (should be expanded based on your org):

**Subscriber Stage (0-24):**

| Number of page views is equal to 5+ | 3 points |
| --- | --- |
| Has visited exact URL (blog page) | 5 points |
| Has visited exact URL (about us page) | 2 points  |
| Form submission (blog/newsletter form) | 10 points |
| Email address is known | 4 points |

**Lead Stage (25-49):**

| Has visited exact URL (solutions page) | 3 points |
| --- | --- |
| Has visited exact URL (resources page) | 3 points |
| Form submission (whitepaper/ebook form) | 20 points |
| Company name is known | 3 points |
| Phone number is known | 5 points |

**MQL Stage (50-74):**

| Has visited exact URL (product page) | 3 points |
| --- | --- |
| Has attended product webinar | 10 points |
| Has visited exact URL (partners page) | 3 points |
| Form submission (demo form) | 30 points |
| Size of company is known | 5 points |

# Campaigns:

Create hierarchies for broad and granular reporting.

FY2020 Events (grandparent) 🡪 create a child campaign for each event under this

FY2020 Content (grandparent) 🡪 create a child campaign for each eBook, whitepaper or webinar under this

FY2020 PPC (grandparent) 🡪 create a child campaign for each ad group/channel

# Create standard naming conventions:

| **Landing Pages** |  |  |  |
| --- | --- | --- | --- |
| Naming convention: | Name | Type of page | LP / TYP | LP | Landing page |
| **Email** |  | TYP | Thank you page |
| Naming convention: | Type | Name of email | Send List / Geo / Persona | TOFU | Top of the funnel |
| **CTAs** |  | MOFU | Middle of the funnel |
| Naming convention: | Type | Campaign | Name of asset | BOFU | Bottom of the funnel |
| **Campaigns** |  |  |  |
| Naming convention: | Goal | Type of Asset | Title | Persona |  |  |
| **Lists** |  |  |  |
| Naming convention: | Property | Value | Date Range (if applicable) |  |  |
| **Workflows** |  |  |  |
| Naming convention: | (Internal) | Goal (Objective) | Persona (Value) |  |  |
| **Forms** |  |  |  |
| Naming convention: | Page / Asset | Stage of Funnel |  |  |
|  |  |  |  |

# Get leadership to sign!

| Agreement Between Parties |
| --- |
| The Marketing Team | Dept. | The Sales Team |
|  | Name |  |
| CMO | Title | Head of Sales |
|  | Signature |  |
|  | Date |  |