

Template

Create an effective sales and marketing service level agreement

Your sales and marketing SLA serves to clear up confusion and solidify the roles of each department in the entire lead generation process. Here, both departments commit to supporting each other, based on concrete numerical goals. To maximize accountability and empowerment, it is best to define the SLA in a joint meeting between sales and marketing.

Stakeholders

- Sales Leaders
- Marketing Leaders
- Sales Team
- Marketing Team

Step 1: Define your ideal customer profile

As with everything else in your demand generation process, your SLA begins with defining and agreeing on the criteria for who you are trying to attract. If everyone is not clear about who you are targeting, you will struggle to gain sales and marketing alignment. The more specific and clear the definition of your ideal customer profile is, the better.

In our **Ideal Customer Profile template** we walk you through the process of defining a top-notch ideal customer profile. No time? Here's a short summary:

- Look at your happiest existing customers.
- Prioritize customers that will stay with you.
- Find ready, willing and able companies.

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Step 2: Create standardized lead definitions

Make sure that everyone shares the same definition of what a lead is (and what it is not). To make sure everyone is on the same page, you should define each lead phase.

At a minimum, you should define:

- Qualified lead
- Marketing qualified lead (MQL)
- Sales qualified lead (SQL)

Leads that do not meet the threshold are unqualified leads, and should be disqualified from the sales funnel.

Step 3: State the goals of both parties

Both teams should have their goals described in this section of the contract. The goal should be set up so that when marketing hits its goals, sales can reach its own goal as a result. Agree upon a process for setting these goals each month.

The goals in your SLA, it should outline:

- The expectations sales has for marketing with regards to lead volume and quality.
- The expectations that marketing has for sales on how deeply and actively sales will process each marketing qualified lead.

When setting goals you should consider:

- Sales revenue goals
- Marketing budget

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- Past results of sales and marketing
- Size of the sales and marketing team
- The ramp up of your team members and functional areas (if, for example, your inbound marketing efforts are still being developed, this should be taken into consideration when defining your goals).

Step 4: Define how the handoff occurs

It takes a team effort to increase lead velocity. Define the role each team plays in managing a lead. Use your lead definitions and clearly specify what determines when a lead will be handed off to the sales team and how the handoff will be managed.

Step 5: Establish protocols for managing leads

Salespeople and marketers often accuse each other of the same thing: not knowing how to manage leads. The purpose of this section of the SLA is to eliminate that concern. There should be no room for doubt about how leads should be treated—by whom, when or how often a lead should be “touched”.

Step 6: Track sales and marketing performance metrics

Your SLA should clearly define the key performance indicators (KPIs) your sales and marketing team use to assess the progress and effectiveness of your demand generation process.

Here are some metrics you may want to track:

- Lead funnel velocity

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- End-to-end conversion ratio
- Number of contacts required to move an MQL to SQL
- SQL to customer ratio
- € value of SQLs sourced (contribution to pipeline)
- Content performance and usage
- Revenue per account

Balance the desire for lots of data with the need when you determine what you will track. Aim to keep the process simple to ensure that everyone pays attention to the same things.

Step 7: Standardize the SLA review process

State how frequently your sales and marketing departments will meet and review the assumptions, processes, and targets laid out in your SLA. For most companies, a review of the SLA every six months should be sufficient. For high-growth companies, quarterly reviews might be more sufficient.

Example

[Insert
your logo]

[Input credentials for your
organization's sales and
marketing department.]

1. Goals and objectives

This agreement serves to (input your information).

2. Our ideal customer profile

The following features characterize (input company name)'s ideal customer profile (input your information).

3. Our lead definitions

All representatives from the sales and marketing team agree on the following definitions of:

- Qualified lead: (input your definition of a qualified lead).
- Marketing qualified lead: (input your definition of a marketing qualified lead).
- Sales qualified lead: (input your definition of a sales qualified lead).

4. Our demand generation goals

Marketing commits to generate N marketing qualified leads per month, and sales commits to reach out to D percent of those leads within X hours, and to contact them at least Y times in the first Z days.

5. How our handoff occurs

The handoff, where the sales department takes over the responsibility for a lead from the marketing department occurs (input your information).

6. Our protocol for managing leads

Marketing commits to cultivate qualified leads (input your information about how, and how often, marketing should “touch” a lead) with the aim of giving them a clear reason to move forward in the sales funnel.

Sales commits to process sales qualified leads (input your information about how, and how often, sales should “touch” a lead) to persuade them to converting into paying customers.

7. Our sales and marketing performance metrics

The key performance indicators (KPIs) that (input company name)’s sales and marketing team use to assess the progress and effectiveness of its demand generation process are the following: (insert your organization’s KPIs).

8. Our SLA review process

The sales and marketing will review this SLA every X months after the effective date below. A representative of either party may submit a written request for review of the agreement at any time.

9. Signatures of stakeholders below

On [date], [year]

On [date], [year]

[Title / Marketing]

[Title / Sales]

[Name]

[Name]

Additional Resources

» **Introduction to Ideal Customer Profile**

Defining your ICP is among the most important things you can do to maximize the relevance of your marketing and the results of your sales efforts..

» **Ideal Customer Profile Template**

Use this template to find out what your happiest customer have in common.

» **5-Step Guide to Implementing Real-Time Sales**

Eight lessons, delivered straight to your email inbox with the most valuable content.

» **The 100+ Best Sales Tools**

100+ sales tools in 10 categories every B2B professional should know.

Need help?

We're happy to help. **Reach out to the Vainu team on the chat**, and we'll get you sorted in no time.



VAINU

Vainu is building a Sales Intelligence platform that helps salespeople and marketers move forward. Powered by technology to collect, read and understand all company information ever written, Vainu makes these real-time company insights easily consumable directly in its customers' existing business systems.

Headquartered in Helsinki, Finland, the company launched in 2013 and is now at €15 million in annual revenue with a team of 150, spread across Europe. Over 2,000 sales and marketing teams globally use Vainu's data to personalize customer interactions at scale—ultimately leading to more sales.

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