Sales & Marketing Alignment Checklist

Research proves that those organizations that document service level agreements (SLA) between sales and marketing are more successful. The following common SLAs provide clear guidelines for collaboration. How many does your organization use?

Lead Management

☐	What behavioral criteria is used to determine when a lead is ready for sales?	Do you trigger a lead follow up task off specific actions such as downloading buyer-ready content? Do you pass along event registrations?
☐	What firmographic/ demographic information is required?	Must they belong to a specific set of targeted accounts? Be part of specific industries or sized organizations? What role should the contact play in the organization?
☐	Where are leads assigned for follow up?	Do you assign a task in your sales automation system? Do you send an email notification? Are they assigned in a queue?
☐	What's an acceptable time from lead assignment to follow up?	When campaign leads are assigned to sales, how much time do they have to follow up? Usually this is measured in hours or days.
☐	How soon after lead action must it be in the CRM system?	Many lead types are automated, i.e. website form fills, however, there are actions such as content syndication and event registration/scans which require upload into the system. How long after an event do you allow for lead upload and cleaning?
☐	Time from lead assignment to follow up for contact me/demo requests?	When in-bound, high urgency leads are assigned how much time does sales have to follow up? This is usually measured in 1 – 2 business hours. How are they reassigned if that timeframe is not met?
☐	What hours will web chat be staffed?	If you have a web chat capability, what hours will it be staffed, and what resolution/conversion rates will you require?
☐	Inbound call hold times	If you have a busy in-bound phone center, what are acceptable hold/wait times?
☐	Marketing supplied lead conversion rate to next step (meeting/demo)	What % of leads passed to sales are expected to convert to a first meeting/demo?
☐	What is your acceptable lead rejection rate?	Some leads will be rejected; what threshold of rejected leads is your organization willing to accept? Does it vary by rejection reason?

Questions? email Samantha.stone@marketingadvisorynetwork.com

PRO TIP: When using SLAs, don't forget to set up exception reporting so the guidelines can be enforced and improved over time.

Data Integrity

☐	New contact database additions	How many new contact names/accounts do you expect sales to add to the database each month?
☐	Win/loss data collection (reason captured in database)	What % of lost opportunities must include a loss reason?
☐	Lead source attribution when sales sources a new contact	When sales sources a new name for the database how do you want them to attribute the lead source?
☐	Completion of database profile fields for each contact or account	What % of the fields you have in the database do you expect sales to fill out, at what stage of the sales process? For example, do you require sales to list all competitors who are in an opportunity? Are they required to add a contact's physical mailing address?
☐	Bad data rejection rate	What % of leads passed from marketing can have bad data i.e. a wrong phone number?

Campaigns & Content

☐	Campaign launch timeframe	How long before a campaign goes live must marketing train sales on it? Where will that training occur?
☐	Content review	What % of the content produced by marketing is sales expected to read?
☐	Content distribution	Where are new content assets to be stored?
☐	Training on content & campaigns	When a new content asset or campaign is produced how is sales notified of it?
☐	Content prioritization	How does sales request new content assets?

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