SALES + MARKETING VISION AND ALIGNMENT

Sales + Marketing Alignment is about defining and agreeing on a process between sales and marketing teams with the shared goal of increased revenue generation. We will track whether leads are being worked or not and put a system in place where both marketing and sales are confident in how to work inbound leads and sales targets.

Steps

1. **Confirm Consistent Language and Deal Stages**
    a. Define MQL, SQL, contact, lead, customer, etc.
    b. Determine sales cycle deal stages
        - Target, lead, meetings, when disqualified, closed, won, etc.
2. **Determine Lead Scoring**
    a. Scoring actions that show a willingness or desire to buy and what to do with that information
3. **Complete Sales + Marketing Service Level Agreement**
    a. How many leads marketing needs to generate
    b. What is the expectation of sales for follow up with the leads and reporting back to marketing
4. **Write Lead Handoff Process**
    a. What happens when a lead comes in, what is the expectation of turnaround, when and how are they moved from each deal stage

#1: Confirm language and deal stages

Agree on definitions of a lead

Subscriber ____

Suggestion: Individual who has opted in to our content such as the newsletter or blog

Lead____

Suggestion: A contact we manually enter based on a referral, interaction in-person or on social media

Marketing Qualified Lead (MQL)

____

Suggestions: Fits our buyer profile…i.e.: is a CFO at a U.S. company with over 50 employees. Downloaded an offer, voluntarily shared at least name, email, company, and title. Reached a marketing lead score of 50 as a lead or subscriber.

Sales Qualified Lead (SQL)

____

Suggestions: Requested a quote. Clicked 'talk to us.' Reached a lead score of 100 and has shared a company name, title and email minimum.

Opportunity____

Suggestion: Sales team has entered this lead into the CRM deal stages

Agree on sales cycle deal stages (and commit to behaviors)

Targets____

Suggestion: Prospective deals the sales team is pursuing

Leads____

Suggestion: A referral or warm lead that has not been qualified

Qualifying Meeting____

Suggestion: Meeting is set to review prospect's pain/opportunity, budget, decision timeline.

Fit & High-Level Scoping____

Suggestion: Meeting to gather information to assemble quote/estimate.

Proposal or SOW Delivered____

Suggestion: Waiting for agreement to be signed

Closed Won____

Contact changed to customer

Closed Dead____

Contact(s) changed to subscriber or MQL based on outcome

#2: Determine Lead Scoring

Scoring actions taken by contacts so sales and marketing know what to do and when

Map out all the actions and characteristics possible, then figure out how much those are worth to you. Ask: What does this indicate about the prospect's readiness for the next marketing or sales touch?

Not everything someone can do related to your company means the same thing.

Consider someone who:
Meets three demographic "yeses"
Repeatedly views middle-of-the-funnel articles (all your content should be mapped to your funnel)
Attends your product-related webinars
Asks questions via chat on your homepage
They have six high-value things going for them – demonstrating a lot of interest and fit.

Compare that to someone who:
Meets two demographic "yeses"
Retweeted a couple of your company tweets
Listened to your company podcast for a few episodes
Read a blog post in your resource section
Those are five pretty low-interest and low-fit indicators

Come up with a weighting system that awards "points" for each behavioral activity and demographic alignment. The points can be anything as long as they're weighted in favor of the items that mean more interest and better fit.

Source: Terminus

Example thresholds that upgrade a contact's stage automatically, outside of opting indirectly:

A lead moves to MQL with 50+ points

An MQL moves to an SQL with 100+ points

Example Criteria:

Once contact opts in as a lead their score can increase in two ways:

1. **Implicit Scoring:** These are behaviors that are categorized in three ways:
    a. Critical behaviors (higher scores)
        i. Registered for a webinar: 10 points
        ii. Ask questions via chat on your website: 12 points

    b. Important behaviors (mid-scores)
        i. Downloaded an offer: 8 points
        ii. Opened followup email: 7 points

    c. Influencing behavior (low scores)
        i. Page visit: 1 point
        ii. Viewed landing page: 2 points

2. **Explicit Scoring** (info they shared with you)
    a. Dairy industry: 5 points
    b. CFO, CIO or Purchasing Manager: 7 points
    c. In the contiguous U.S.: 3 points
    d. Company size of $50 million +: 5 points

Source: Terminus

#3: Completed Sales and Marketing Service Level Agreement (SLA)

See HubSpot's guide to creating an SLA.

#4: Write your Lead Handoff Process

Establish the ground rules for marketing and sales team interaction as contacts move up and down the stages.

Document responsibilities alongside your lead stage and deal stage definitions.

Example:

Sales Qualified Lead (SQL) Requested a quote. Clicked 'talk to us.' Reached a lead score of 100 and has shared a company name, title, and email minimum.

Sales team responsibility: Reach out via email or phone within 4 business hours of contact becoming an SQL. Update the CRM accordingly through the deal stages.

Marketing team responsibility: Halt marketing communication and automated messaging immediately unless the sales team says otherwise.

Examples of additional language that helps create clarity:

The marketing team commits to a weekly report to the sales team leaders showing the progress towards our SLA. The report will also include what leads have moved to MQL's and SQL's. The marketing team understands that it is their responsibility to deliver SQL's.

The sales team commits to sharing a monthly report detailing closed sales by lead passed to them. The sales team will change an SQL back to an MQL if appropriate and notify the marketing team of the best approach to nurturing.

Source: Terminus