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Sales & Marketing Alignment Playbook

Sales and marketing alignment isn't easy.

But, it’s necessary.

38%

Higher win rates from aligning sales & marketing

Source: https://pipeline.zoominfo.com/sales/sales-and-marketing-alignment-statistics

So, how can your organization drive #smarketing success?

Here are 5 ways to improve your sales & marketing alignment.

In the playbook:

1. Lead Management
2. Setting Lead Stage Definitions
3. Defining SLAs
4. Meetings
5. Metrics & Measurement

Lead Management

46%

of marketers with mature lead management processes have sales teams that follow up on more than 75% of marketing-generated leads

Source: https://pipeline.zoominfo.com/sales/sales-and-marketing-alignment-statistics

1.

Map your funnel to the buyer’s journey.

Mapping the Buyer's Journey to the Funnel

Determine what stages make sense for your organization - collaboratively with marketing & sales!

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Technical Play: Campaign Attributes and Content Tagging

Ops Instrumentation

- Map/tag content based on voice and CTA
- Add Buyer Journey Stage as a Customer Field on the Campaign Object in the CRM or as a Tag in the MAP (Awareness, Consideration, Decision)
- Add Buyer Journey Stage to Custom UTM Parameters
- Include Tags in Inbound Links from Paid Channels, Content Links, and Emails
- Use Program or Campaign in MAP to Listen for Tags
- Update Campaign Membership in CRM Based on Tags

Report Format and Considerations - Campaigns with Campaign Members (SFDC)

- You don't have to tag everything - start with high volume assets!
- Keep the campaign hierarchy useful - minimize permutations/combinations
- Only track campaign RESPONSE! Save yourself the noise!

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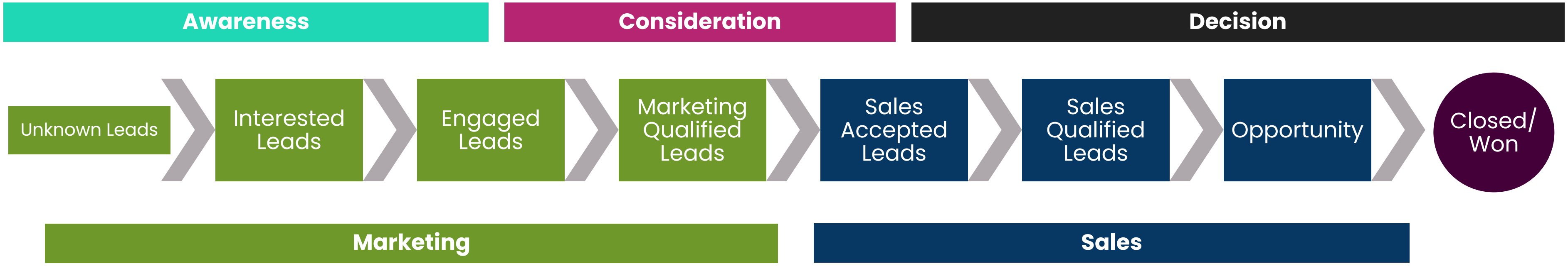
Defining Funnel Ownership – Marketing VS. Sales



Consider where in your funnel sales will own the journey vs. marketing

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Technical Play: Lead Routing & Assignment

Ops Instrumentation

- You can use CRM Assignment Rules
- Trigger logic to bridge from MAP to CRM (especially for PLG shops)
- Queues to manage ownership and visibility
- Track History on Lead Owner in CRM
- Date stamp workflow for Last Lead Assignment Date (People Only - exclude queues)

Report Format and Considerations - Leads and/or Lead History (SFDC)

- Filter down to changes on the Lead Owner
- Group based on Last Lead Assignment Date and/or Status Date Stamps
- Graph by New Value and Edit Date for relative routing parity comparisons

Recommendations

- One size doesn’t fit all – understand the nuances of your business
- Make this is a collaborative effort between sales and marketing

Questions to Consider

- What funnel stages does your organization have?
- How do these stages map to the buyer’s journey?
- Where is sales involved? Where is marketing involved?

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Setting Lead Stages & Statuses

2.

Define lead stages and statuses as a go-to-market team.

Identify And Define Lead Stages

Awareness | **Consideration** | **Decision**

Unknown Leads

Interested Leads
A lead that has done something to indicate interest (e.g., a form fill) but hasn’t met the criteria to be an MQL.

Engaged Leads
A lead that continues to engage with content, provide additional demographic/firmographic info that matches ideal customer profile characteristics.

Marketing Qualified Leads
A request for contact; or an engaged lead with continued interaction and additional demographic/ firmographic and qualification criteria provided, resulting in an MQL.

Sales Accepted Leads
An MQL that Sales has reviewed, accepted and agreed to work.

Sales Qualified Leads
An SAL which Sales has qualified and determines, after a series of interactions that an opportunity exists.

Opportunity
An SQL who has become a real potential customer with a dollar amount attached. May be a particular action or set of criteria in order to move to this stage.

Closed/ Won
A paying customer resulting from a closed-won opportunity.

Marketing | **Sales**

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Example Lead Stage Definition Template

Stage	Definition What operationally defines this stage? *Determine what works best for your business*	What Happens? What will the sales outreach look like? Emails, calls, etc. What will the marketing outreach look like? What content will be shared? What offers will be shared?
Lead	Any net new website conversion (lead)	• Continued nurturing to stay top of mind and increase engagement
Low-Fit Hand-Raiser	A lead that requests contact or requests a demo and MadKudu fit < Medium	• Enroll in low fit demo Outreach sequence
Hand-Raiser MQL	A lead that requests contact or requests demo and MadKudu fit = Medium+	• Enroll in qualified demo email sequence, requiring medium-level personalization • *If not auto-enrolled or sales engaged at some point AE to reply within 24 hours (business hours/days)*
MQL	A lead whose MK lead grade = A or B	• Manual, personalized outreach

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Technical Play: Date Stamping & Campaign Stamping

Ops Instrumentation

- Create a Date (or Date/Time) Field for each Status in the funnel (consider First / Most Recent) for PQL/MQL statuses
- Set Triggered Campaign/Process in MAP or CRM (your preference) to monitor (forward) changes in Status and set Date fields with TODAY() or NOW() values
- SFDC: Employ APEX code to monitor forward MQL (or even other status changes), scan last campaign responded status and add to lookup field for MQL Campaign.

Report Format and Considerations - Leads and/or Accounts with Contacts (SFDC)

- Cohort stages by the date stamps - see relative movement through the funnel over time
- Group further by MQL Campaign to see campaigns that push the threshold most
- Consider Remarket/Disqual, Scoring Decay and Sales Cycle impact on time delay for Re-MQL (usually 60 - 90 days) 🤔

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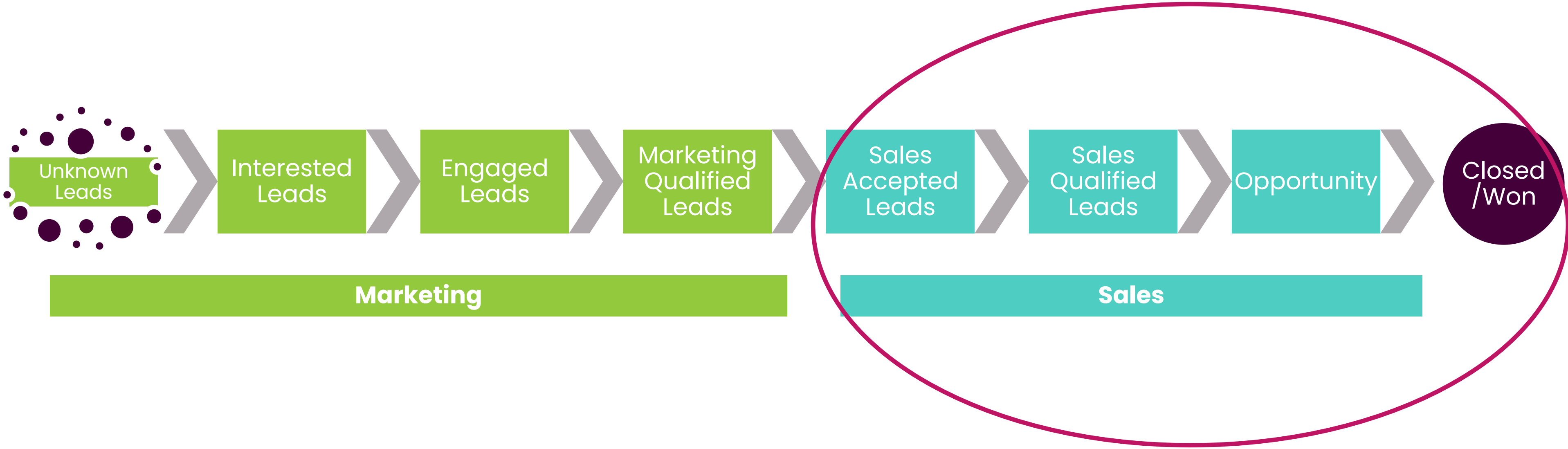
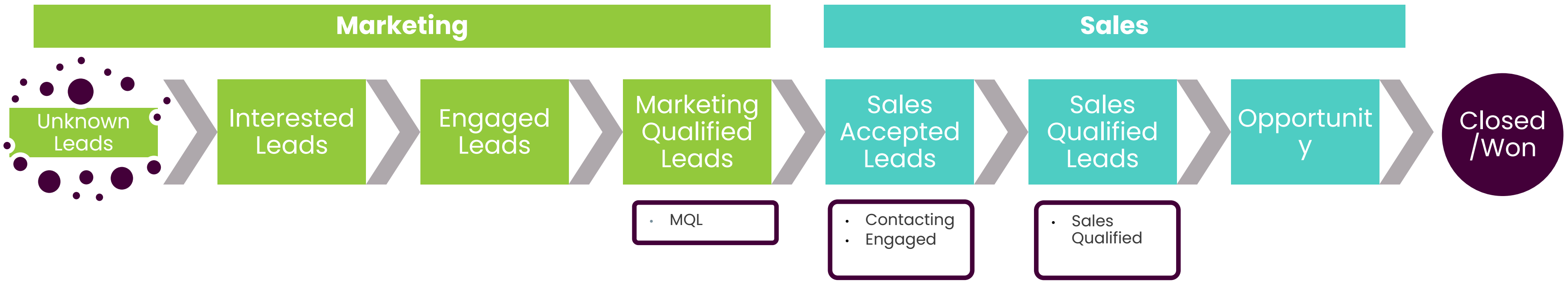
Tracking The Rest of The Journey

Leads are handed to Sales to bring the lead further down the funnel through defined lead stages.

But how do all parties involved, and key stakeholders know this is actually happening?



Mapping Lead Statuses to Lead Stages



Use lead stages to understand where things are stalled or progressing

Technical Play: Lead Velocity Tracking

Ops Instrumentation

- Create Formula Fields for Status-to-Status Incremental Math
- Create Formula Field for Status-to-Date (Post-Qualification or Mid-Funnel Age) leveraging OR() and TODAY() logic.
- Create Formula Field for MQL → SQL(Conversion) and/or New Lead → SQL(Conversion) timeline

Report Format and Considerations - Leads and/or Accounts with Contacts (SFDC)

- Use Averages, Min and Max (to check outliers) on calculated velocities
- Calculate averages for weekly or monthly MQL cohorts to see if funnel is speeding or slowing

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Lead Status Examples

Lead Status	Definition
Marketing Qualified Lead	MARKETING HANDOFF. New lead surpassing the MQL Threshold (100+).
Contacting	Sales reviews lead and ensures it meets minimum requirements to engage. If yes, sales attempts contact with the MQL per the SLAs.
Engaged	Sales is engaged with the lead and attempting to uncover criteria per the SLAs.
Sales Qualified	Sales has contact the MQL and it meets the criteria for opening a deal.
Remarket	Unable to engage with lead OR engagement occurs and the prospect is not in an active buying cycle.
Disqualified	Not a Client target.
Existing Opportunity or Customer	The lead is part of an existing organization with an active contract or Opportunity.

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Recommendations

- Involve key sales and marketing stakeholders - don’t make decisions in a silo
- Make the process collaborative
- Try to only make changes every 6 months - a year
- It’s better to start with more stages rather than fewer
    - Easier to consolidate stages than break them out

Questions to Consider

- What are your lead stages? (Subscriber, Lead, MQL, Hand-raiser, etc.?)
- How do you operationally define each lead stage? (What qualifies someone as a MQL?)
- How will both sales and marketing engage depending on the lead stage? (What happens when someone becomes a MQL?)

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Defining SLAs

3.

Set clear & measureable SLAs for both Sales and Marketing.

Sales SLA Based on Lead Stage

	Hand Raiser	MQL	All Other Leads
Goal	Book a meeting	Offer helpful content with ultimate goal of booking a meeting	Offer content to drive continued engagement
Engagement	Fastlane Sequence Enrollment	Sequence Enrollment	Marketing Nurture
Timing	1 hour	24 hours	1 week

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Effective SLAs

- **Very Good** leads - contacting them within 5 min yields a 3x conversion rate compared 1h+
- **Very Good** leads - contacting them within 5 min yields a 2x conversion rate compared 30 min-1h
- **Good** leads - contacting them within 30 min increases conversion rate by 80% compared 2h+
- **Good** leads - contacting them within 30 min increases conversion rate by 40% compared 1-2h
- **Medium** leads - contacting them within 5h increases conversion rate by 15% compared 24h+Setting up a marketing SLA ensures accountability on both teams

Marketing SLAs

- Setting up a marketing SLA ensures accountability on both teams

- **Consider measuring:**
  - Acceptance rate of leads
  - Conversion rate to SAL
  - Conversion rate to pipeline (SQO)

- Marketing should consider ways to **avoid spikes and dips in MQL volume** through campaign management and lead flow
  - Establish communication plan between marketing and sales for when major influxes occur

SLA Example

Lead Statuses	Definition	Owner	SLA Example
MQL	MARKETING HANDOFF. New lead surpassing the MQL threshold	Marketing → Sales	• Alert sent to Sales • After initial review, sales rep must contact lead via phone or email within 24 hours and change status to “Contacting” • If no status change from “MQL” to “Contacting” or “Bad Data” within 24 hours, alert sent to Sales Manager
Contacting	Sales reviews lead and ensures it meets minimum requirements to engage. If yes, sales attempts contact with the MQL per the SLAs.	Sales	• 8 attempts (4 calls, 4 emails) within 10 business days • If no contact is made, see “Return to Marketing” (no response) or “Bad Data” • If not qualified for engagement change status to “Return to Marketing” or “Disqualified” with reason • If after 10 business days, no status change, alert sent to Sales Manager
Engaged/Working	Sales is engaged with the lead and attempting to uncover criteria per the SLAs.	Sales	• Sales rep changes lead status to “Working” • Sales rep uncovering qualification criteria in order to open deal
Qualified	Sales has contact the MQL and it meets the criteria for opening a deal.	Sales	• Sales rep has met all criteria to open deal • Sales rep changes lead status to “Qualified” • Sales rep opens deal indicating $$ amount in CRM

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Recommendations

- Specify follow-up times, make sure SLAs are quantifiable
- Utilize best practices times for follow-up, but adjust as necessary for your business
    - Hand-raisers: 1 hour (max)
    - MQLs: 24 hours
    - Leads: 1 week
- Consider creating a marketing SLA as well as a sales SLA so both teams are held accountable

Questions to Consider

- What is the goal of following-up with each lead stage? What is the expected outcome?
- How long should follow-up time be for each lead type? How will you prioritize certain lead stages over others?

Meetings

4.

Create effective sales & marketing meetings (that people actually want to attend)

Suggested Meeting Agenda

Metrics & SLAs

- Links to relevant reports

Agenda

- Strategic topics
  - What are the bigger topics that need to be addressed?
- Operational topics
  - What are the quick logistical topics to be discussed?

Team Updates

- Add prior to the meeting
- Opportunity for all contributors to add any updates or things on their mind

Action Items

- Create a section to tag and catalog action items that come up
- Make sure to start with this the following meeting to confirm what has been completed and what is still outstanding

Recommendations

- Make sure meetings are collaborative
    - Ensure both teams have time to share
- Keep it conversational
    - Come prepared, but don’t make the meeting too formal
    - An ongoing google doc/Notion doc/etc often works better than trying to prepare slides
- Share the meeting agenda prior to the meeting so everyone comes prepared
- Align on key metrics each week
- Depending on the size of your organization consider whether it makes sense to have one meeting or separate meetings for operational and strategic topics

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Questions to Consider

- What meeting cadence works best for your teams?
    - What day or time will make the meeting most productive?
- Who will facilitate the meeting? Will this rotate each week?
- How do you make the meeting effective and efficient for both teams?
- How will you track notes and action items?

Metrics & Measurement

5.

Measure & optimize both sales and marketing efforts to iterate.

What to Measure

	What	Where
Time to first touch	Understand how your time to first touch stacks up compared to SLA recommendations	MadKudu (Insights → Hand Raiser SLA → Time to first touch analysis)
Untouched Hand Raisers	Understand which leads have raised their hand and haven't been contacted by sales	MadKudu (Insights → Hand Raiser SLA → Untouched handraisers)
Rejected leads	Understand which leads have been rejected and discuss with sales to make adjustments as necessary	MadKudu (Insights → Hand Raiser SLA → Rejections)
Lead status & follow up	Utilize reports in your CRM to review weekly to identify how outreach is going, types of responses received, any gaps in the operational flow	SFDC (or other CRM)

Technical Play: MQL Cohorts

Ops Instrumentation

- Create an MQL Reason or MQL Type Field (picklist)
- Include picklist values for Handraisers, Demo Requests, Scored (or various parallel scoring methods)
- Depending on method of qualification, update field accordingly
- Consider separate centralized MQL programs/workflows based on volume

Report Format and Considerations - Leads and/or Accounts with Contacts (SFDC)

- Can also be used to cohort different threshold if they are modified, campaign-specific MQLs, etc. A simple picklist can be relatively powerful deterrent for gaming the MQL threshold/criteria
- Ensures accountability within Marketing to ensure the best
- Consider overlapping qualification processes (insert Venn diagram 🤓) as additional picklist values if you are comparing relative volumes across methodologies.

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Recommendations

- Align teams on which reports will be used to track success
- Set up reports in places that the necessary teams have access to and use regularly
- Automate reports

Questions to Consider

- How and where are you tracking?
    - Time to first touch
    - Untouched Hand Raisers
    - Rejected leads (comparison between rejected leads and closed lost opps)
    - Overall lead follow-up
    - Opportunity progression

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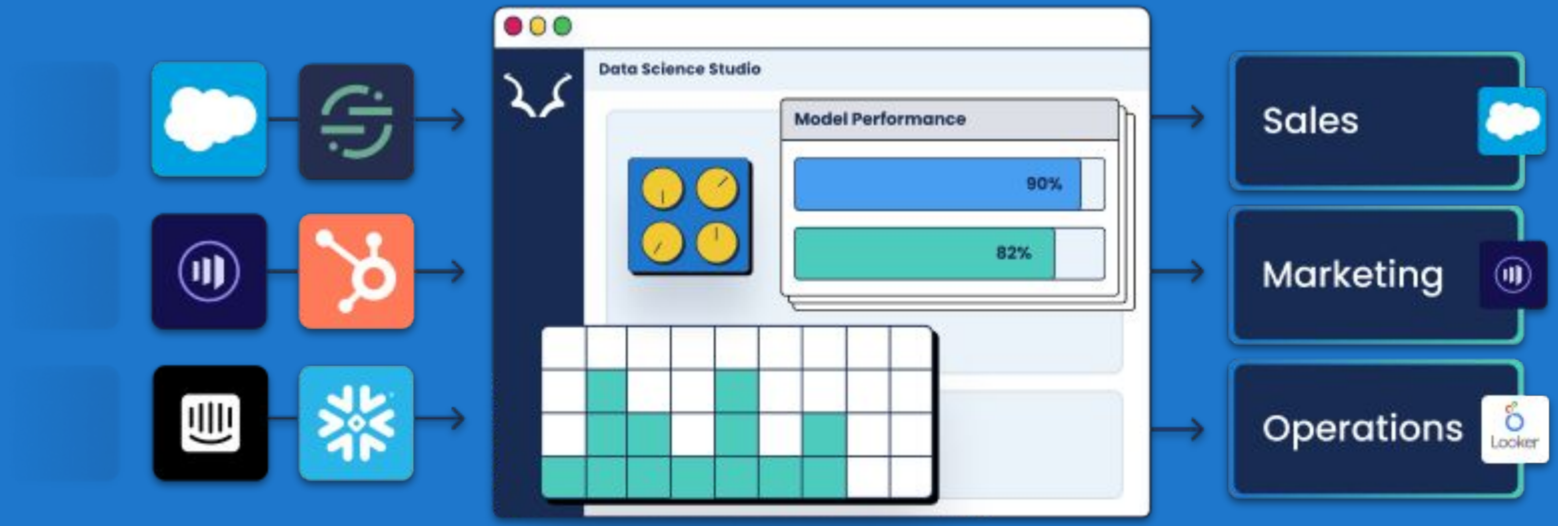
Good luck on your sales & marketing alignment journey!


Data Science Studio
Model Performance
90%
82%
Sales
Marketing
Operations
Looker