

|  |
| --- |
| **Hi There.**  Thanks for Downloading This Resource. |
| ↓↓↓  How to Use This Template  This template contains prompts and sections commonly found in SLA templates.  Below, you’ll see:   * One short, one-page SLA template when things can be concise. * One several-page long SLA template for when you need to be detailed.   In the long template, you’ll see numerous sections, each included with the following:   * *Italicized Information:* To illustrate the importance of each of the sections included, there’s a quick description of the section and suggestions of what you should think about when writing yours. You can erase these introductions after you’ve read them. * [UPPER CASE PROMPTS IN BRACKETS]: These are intended for you to erase and fill in with information for your specific project. * Normal Placeholder Text: This is suggested wording to include in your SLA, but should be altered, deleted, or added to as you see fit.   Once you’re ready to begin, delete this page and start filling out your info below. Remember, you can add/edit/delete any wording or sections you see fit for your projects. |

Marketing & Sales SLA [Short]

|  |  |
| --- | --- |
| **Marketing**  **Point of Contact:**  *Name*  ***Email*** | **Sales**  **Point of Contact:**  *Name*  ***Email*** |
| **Goals** | |
| Traffic: *Traffic Goal*  Leads: *Lead Goal*  MQLs: *MQL Goal* | Opps / Demos: *Opp / Demo Goal*  Deals: *Deal Goal*  Revenue: *Revenue Goal* |
| **Initiatives for [Time Frame]** | |
| **In [Time], Marketing will be focusing on...**   * Initiative 1 * Initiative 2 * Initiative 3 | **In [Time], Sales will be focusing on…**   * Initiative 1 * Initiative 2 * Initiative 3 |
| **Staying Accountable** | |
| **If Marketing does not meet its goal, it will…**   * Promise #1 * Promise #2 | **If Sales does not meet its goal, it will…**   * Promise #1 * Promise #2 |
| **Communication Channels** | |
| * **Slack** – Utilized for [Purpose]. Updates will be sent by [person] every [frequency]. * **Email** – Utilized for [Purpose]. Updates will be sent by [person] every [frequency]. * **Meetings** – To be held by [person] every [frequency]. | |

[Company Logo]

Sales & Marketing

Service Level Agreement

[Long]

[TIME FRAME FOR AGREEMENT]

LAST MODIFIED: [DATE LAST MODIFIED]

DRAFTED BY: [NAME, EMAIL ADDRESS]

Company Goals

*What are the company’s major goals, pertaining to sales and marketing, for the quarter, half of year, or year? This can include soft goals, such as “become a leading authority online in our industry,” and soft goals, such as “sell 100,000 units.”*

1. [GOAL #1]
2. [GOAL #2]
3. [GOAL #3]

Marketing Goals

*Outline the Marketing team’s goals as they pertain to sales. These goals should be specific, so all parties understand how the goal is measured. Examples include traffic, subscriber, lead, and MQL numbers, ad impressions, or number of collateral pieces created.*

1. [GOAL #1]
2. [GOAL #2]
3. [GOAL #3]

Sales Goals

*Outline the Sales team’s goals as they pertain to marketing. These should include close rates of leads and contacts generated from marketing so that the team understands the impact of their work. Overall deal and revenue goals can be specified as well.*

1. [GOAL #1]
2. [GOAL #2]
3. [GOAL #3]

Opportunity Handoff

*This is the section where you’ll outline:*

1. *What determines a qualified lead in the eyes of sales and marketing.*
2. *How many of these marketing will be responsible for generating.*
3. *How sales will respond to these leads.*

MQL Criteria

At [COMPANY NAME], a Marketing Qualified Lead (MQL) is defined as a lead that…

* [CRITERIA 1]
* [CRITERIA 2]
* [CRITERIA 3]

Lead Scoring

*If you engage in lead scoring, outline how and why points are added to your leads.*

Marketing’s Responsibility

Marketing is responsible for generating [MQL NUMBER] of these MQLs. Sales will be alerted of new MQLs buy [METHOD].

Sales’s Responsibility

Sales is responsible for determining the workability of MQLs and reaching out to them within [TIME FRAME] of handoff.

Feedback & Communication

*Describe what initiatives, programs, and communication channels will be utilized to help both teams meet their own goals and contribute to the company’s goals.*

Communication Channels

*What channels will you utilize to keep the line of communication open between the two teams?*

* [SLACK CHANNEL]
* [EMAIL ALIAS]
* [OPEN OFFICE HOURS]

Team Meetings

*How often will the two teams meet to collaborate, share ideas, and provide a progress update? What will the structure of these meetings be, and who will be in attendance – all members of both teams, or only team leads?*

Feedback

*What is the best way for marketing and sales to provide feedback to one another on their performance? Sales needs to know if they’re paying attention to the right leads, while marketing needs to know if the leads they’re passing to sales are the best quality.*

Reporting

*Explain how you’ll determine success through reporting and tracking metrics.*

Technology & Software

*Share the tools your sales and marketing team will use to remain transparent and track progress. This may include:*

* *A company CRM.*
* *A shared Google Drive.*
* *A shared spreadsheet online.*

Conversion & Close Rates Breakdown

*Attach a spreadsheet or chart for the numerical breakdown of your sales close and conversion rates. If you don’t have a dashboard built, you can* [*download one here via Excel*](https://www.thedigitaldragons.com/hubfs/TDD-Lead-Goal-Calculator.xlsx)*.*