1. [](http://www.pedowitzgroup.com/)

Marketing and Sales  
Service Level Agreement

Template

Date

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* Agreement Overview

1. This Agreement represents a Service Level Agreement ("SLA" or "Agreement") between [*Company Name*] Sales team and [*Company Name*] Marketing team on the lead management and lead qualification process. This includes lead status, lead stage and lead funnel definitions as well as the marketing to sales lead handoff criteria and the sales acceptance and rejection criteria.
2. This Agreement remains valid until superseded by a revised agreement mutually endorsed by the stakeholders.
3. This Agreement outlines the parameters of all lead management processes covered as they are mutually understood by the primary stakeholders.

Goals and Objectives

1. The **purpose** of this Agreement is to ensure that the proper elements and commitments are in place to facilitate a flow and acceptance of marketing qualified leads to sales.
2. The **goal** of this Agreement is to obtain mutual agreement for the lead qualification criteria and lead handling between the Marketing department and the Sales department.
3. The **objectives** of this Agreement are to:

* Provide clear reference to lead ownership, accountability, roles and/or responsibilities.
* Present a clear, concise and measurable description of lead qualification, acceptance, disqualification and nurture.
* Match perceptions of expected lead quality with actual lead quality and delivery.

Stakeholders

1. The following Marketing and Sales personnel will be used as the basis of the Agreement and represent the primary stakeholders associated with this SLA:

Sales Representatives:

Marketing Representatives:

Roles

Marketing:

* Generate leads
* Score leads
* Nurture leads and contacts
* Qualify Leads
* Hand off qualified leads to Sales

Sales:

* Adds only contacts to CRM (not leads)
* Accepts or Rejects Marketing Qualified Leads
* Converts Leads to Contacts
* Maintains the account/contact info
* Adds opportunities
* Adds primary contact info to opportunities
* Wins deals

Periodic Review

1. This Agreement is valid from the **Effective Date** outlined herein and is valid until further notice. This Agreement should be reviewed at a minimum once per fiscal year; however, in lieu of a review during any period specified, the current Agreement will remain in effect.
2. The [*Title/Role, i.e. Chief Marketing Officer*] ("Document Owner") is responsible for facilitating regular reviews of this document. Contents of this document may be amended as required, provided a mutual agreement is obtained from the primary stakeholders and communicated to all affected parties. The Document Owner will incorporate all subsequent revisions and obtain mutual agreements / approvals as required.
3. **Chief Marketing Officer:** Company name
4. **Review Period:** Bi-Annual (6 months)
5. **Previous Review Date:** January 1, 20xx
6. **Next Review Date:** June 1, 20xx

* Lead Qualification Agreement

1. The following detailed service parameters are the responsibility of the lead qualification process in the ongoing support of this Agreement.

Lead Definitions

1. The following are the types of leads defined in the lead funnel

* Raw – person identified as worth engaging, no relationship yet, example list import
* Inquiry – person has at least one response, expressed interest, or   
  has been sent back for re-marketing
* MA Qualified Lead – person sent to lead qualification team (Business development reps, Sales Development reps, telemarketing) for qualification
* BDM Accepted Lead - a person at a New Name Account, or a person in an installed base account, that may represent a new opportunity.
* Marketing Qualified Lead – person that marketing/BDM feels is ready for Sales attention.
* Sales Accepted Lead – a person at a New Name Account, or a person in an installed base account, that may represent a new opportunity.
* Sales Qualified Lead - Once a lead is recognized by sales as having a viable need, can be associated with an existing account or a revenue opportunity. Usually leads are converted to Contacts at this point.
* Contact/Account (Tie Names to Known Accounts)
* Opportunity – opportunity with a revenue value. Link the opportunity to the primary contact. This can be done when the lead is converted to a contact or sometime subsequently.

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Lead Qualification Criteria

1. The following outlines the criteria for each lead type:

* **Marketing Automation Qualified Leads:** In instances where Marketing has a lead qual team (BDM, SDR, ISR, Telequal, etc) to engage with prospects and further qualify them, before passing them to Sales, the Leads are passed to Lead Qual with a lead status of “MAQL”. An additional lead status of “BDM-Connected” may be used to signify that lead has successfully connected with the person. After 72 hours the lead qual rep is expected to change the status to MQL (to send it to Sales), to Disqualified or Junk, or to Re-Market to send it back to Marketing for further nurturing. The lead must score at least NNN points to be passed to the Lead Qualification Team. Details on the lead scoring are in the attached appendix.
* **Marketing Qualified Leads (MQLs)**: In the event that a Lead Qual team is used, they determine if a lead is an MQL. If no Lead Qual team is present then MQLs are defined by Marketing as those leads with a lead score of between 76 and 100 or more points. Details on the lead scoring are in the attached appendix. The additional information that the Lead Qualification team MUST append to the Lead record before it can become an MQL is:
* **Sales Accepted Leads (SALs)**: SALs are leads whose lead status has been changed from MQL to Sales Accepted in the CRM by a Sales Team member. Within 2 business days of receiving an MQL, a sales team member **must** change the Lead Status to SAL to acknowledge the handover of the lead. This is not an indication of the quality of that lead as judged by Sales (that is what SQL status is for). Ownership of the lead is moved from Marketing to the appropriate Sales rep.
* **Sales Qualified Leads (SQLs)**: SQLs are defined as leads that have been determined by Sales to be high quality, and represent a current or future opportunity. They are converted to a Contact in the CRM and as some time subsequently attached to an Opportunity.
* **Disqualified Leads**: Disqualified Leads are defined as leads whose leads status has been changed to Disqualified or Junk in Salesforce.com by a Sales Team member or by Marketing. It means that the individual will never represent an opportunity for the company and will not be marketed to, nor called, in the future.
* **Re-market Leads**: Re-market Leads are leads whose lead status has been changed to Re-market in Salesforce.com by a Sales Team member or tele-qualification. It is an indicator that the lead was believed by Marketing to be ready for Sales attention (MQL) but that proved to be not the case once Sales engaged the person. Sales deem that this person could represent an opportunity in the distant future but wants marketing to continue to nurture this prospect in the interim. Ownership of the lead remains with the Sales Rep, but no further action is required by Sales until the prospect is scored substantially higher and passed back to the rep as an MQL (again).

Lead Qualification Flow

1. The following diagram outlines the lead qualification flow process. It shows how leads enter the funnel, become qualified and passed to sales.

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* Lead Qualification SLA

1. The lead qualification SLA outlines the responsibilities of the marketing and sales in terms of qualified leads. The Agreement also outlines the escalation rules for when these responsibilities are not meet.

Marketing Qualified Leads

1. All inquiries will be scored electronically first to determine whether they meet the criteria to be a MQL. Any lead with a lead score of at least 76 or above will be considered an MQL. All MQL’s will be sent to Salesforce.com and assigned to the proper Sales Representative based on the lead routing rules defined in Salesforce.com.
2. All other inquires who do not meet the scoring threshold of at least 76 points will continue to be nurtured through automated programs in Marketo until they reach the scoring threshold.

Sales Accepted Leads

1. All MQLs will be assigned to a Sales Representative within an hour after becoming qualified. All MQLs will be sent to Salesforce.com with a lead status of MQL. Once assigned, the Sales rep will have 48 hours to change the lead status from MQL to Sales Accepted, Sales Rejected or Marketing Re-nurture based on the information Marketing has sent to Salesforce.com about the lead.
2. Marketing will be notified via an email alert when an MQL is sent to sales. If the lead status is not changed within 48 hours an escalation alert with be sent to Sales Management to follow-up. The average follow-up time on MQLs will be measured and reported on weekly.

Sales Qualified Leads

1. Once the Lead becomes Sales Accepted it is up to the Sales rep to call or email the lead to qualify it to make sure it meets the proper sales criteria, such as BANT (budget, authority, need, and timeline).
2. The Sales rep has 60 business days to convert a Sales Accepted Lead to a Contact, an Account, and optionally an Opportunity in Salesforce.com. If the lead has not been converted within 60 days an alert will be sent to Sales Management and the lead will be reassigned to another Sales rep.

Disqualified Leads

1. A Sales rep can reject an MQL or disqualify a SAL by changing the lead status from MQL or SAL to Disqualified. Disqualified leads will have their lead scores permanently set to zero. These leads will be suspended from receiving any further Marketing communications unless they complete a Contact Us or Request a Quote form.

Re-Market Leads

1. A Sales rep can re-assign an MQL or SAL to Marketing by changing the lead status from MQL or SAL to Re-Market. Re-Market leads will be sent back to marketing for further nurturing and they will have 50 points deducted from their lead score, thus ensuring they are much warmer next time they come through the process.

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| Agreement Between Parties | | |
| The Marketing Team | Dept. | The Sales Team |
|  |  |  |
| Jane Doe | Name | John Deer |
| CMO | Title | VP, Sales |
|  | Signature |  |
|  | Date |  |