MARKETING & SALES SERVICE LEVEL AGREEMENT

COMPANY GOALS

[Company name] has a stated business goal of generating $_____ in annual revenue this year. To meet the annual goal, the current run rate of $_____ in monthly revenue must increase to a goal run rate of $_____ per month by June and be sustained through December. By the end of 2023, the company should have realized $_____ in annual revenue for the year.

- Goal 1: Generate monthly revenue of $_____ by June 2023 and sustain that through the end of the year.
- Goal 2: Finish 2023 with $_____ in annual revenue.

MARKETING GOALS

Based on the company's stated business goals, current conversion rates, and projected improvement in conversion rates, the marketing team needs to meet the following monthly KPIs:

KPI	Monthly Goal
Open Leads	720
MQLs (Seek Discovery Call)	208
SQLs (Discovery Call Scheduled)	96
Opportunities	34

SALES GOALS

Based on the company's stated business goals, the sales team agrees to follow up on all MQLs within an hour, or during the first hour of the next business day for leads that come in after hours. The timing starts once the assigned sales representative is notified by HubSpot [or other CRM] of the MQL's interest in our solution.

The sales team also agrees to the following goals:

- Increasing the close rate from 25% on proposals submitted to 30% by June 30, 20__ and to 35% by the end of the year.

- Decreasing the days in our sales cycle from 65 days to 60 days by June 30, 20__ and to 55 days by the end of the year.

- The sales team agrees to use the sales process as documented in the CRM and as defined in the 20__ sales team kick-off meeting.

- The sales team agrees to use all the tools, templates and content built into the CRM as shared and outlined in the 20__ sales team kick-off meeting.

OPEN COMMUNICATION

Marketing and sales team performance will be tracked and readily accessible to all team members through a HubSpot [or other CRM] dashboard, which is accessible at [URL]. Other tools in place to facilitate communication include [Slack channel, Asana, email, etc.].

The sales and marketing teams will share feedback and work proactively to quickly address goal-related or other challenges. Feedback between teams will be shared within 24 hours and discussed to resolution at the weekly sales and marketing team huddles. Marketing will provide feedback on sales execution related to lead follow-up and quantitative data on the effectiveness of the sales process (conversion rates at different stages of the sales process). Sales will provide feedback related to the quality of leads and the effectiveness of sales tools that marketing provides.

MEETINGS

The marketing and sales teams agree to work as a team to meet or surpass the company's revenue goals and each individual team's stated goals.

The leadership of the marketing and sales teams agree to meet weekly for 30 minutes to review the past week's performance against stated goals. They agree to share what worked well over the past week and what didn't work so well over the past week. They agree to proactively create shared improvements that can be implemented in the coming week to correct any challenges or issues.

The entire marketing and sales teams agree to meet for one hour once each month to share their 30-day plans for the upcoming month. Marketing will share any changes to the existing marketing execution and any specific campaign tactics scheduled for launch in the upcoming month. Sales will share any changes to the existing sales process execution and any specific needs that require Marketing's help over the next 30 days.

Both teams will share their KPIs, goals, and actual performance metrics from the past month, as well as their expectations around performance against KPIs for the upcoming month.

CONFLICT RESOLUTION

Any conflicts or unresolvable challenges will be presented to a three-person panel that includes the lead marketing executive (CMO or VP), the lead sales executive (CSO or VP), and the CEO. Marketing will select a representative to share its side of the issue or challenge. Sales will select a representative to share its side of the issue or challenge. Each team will have 15 minutes to present, and then a decision will be made. The decision by the panel is binding, and each team agrees in advance to follow the resolved direction.

REWARDS [OPTIONAL]

The marketing and sales teams will be measured together, sit together, work together, and be rewarded together. When both teams achieve their stated goals and the overall revenue goals of the company, both teams will share in a pool of $_____ to be distributed at the discretion of the team leaders [or other reward (e.g., trip)].

FAILURE TO ACHIEVE GOALS

Both teams are being measured on a set of shared goals. Therefore, both teams' performance evaluations will be based on the performance against those shared goals. For the goals to be truly shared, both teams must be accountable for all the goals, not just those in their lane. Should goals not be met, the following actions will take place.

If shared goals are not met after 30 days:

- Review goals and the plan to hit the goals against actual performance.
- Have discussion within the sales and marketing teams to create an action plan to address shortfall.
- Create an action plan that can be implemented immediately to ensure the team does not miss the goals over the next 30 days.
- Select and assign team to implement recommended upgrades.

If shared goals are not met after 60 days:

- Review goals and the plan to hit the goals against actual performance.
- Have sales and marketing team representatives meet with the executive team.
- Create an action plan that can be implemented immediately to ensure the team does not miss the goals over the next 30 days, and present that plan to the executive team for sign-off or revisions.
- Select and assign team to implement recommended upgrades.
- Have team report to the executive team weekly on progress.

If shared goals are not met after 90 days:

- Review goals and the plan to hit the goals against actual performance.
- Have executive team take responsibility to create action plan to deliver desired goals.
- Have executive team review leadership, organization structure, individuals, roles, past performance, current sales and marketing strategy, and current sales and marketing execution plans.
- Select and assign a smaller executive team to implement recommended upgrades.
- Have executive implementation team report to the full executive team weekly on progress.

ACCEPTANCE

MARKETING EXECUTIVE

Signed _____

Name _____

Title _____

Date _____

SALES EXECUTIVE

Signed _____

Name _____

Title _____

Date _____

Source: *Square2*

Marketing & Sales Service Level Agreement / **SIMPLE**

MARKETING	SALES
Point of Contact:	Point of Contact:
Name	Name
Email	Email

GOALS	
Traffic: Traffic Goal	**Opps / Demos:** Opp / Demo Goal
Leads: Lead Goal	**Deals:** Deal Goal
MQLs: MQL 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].

Source: *HubSpot*

CELEBRATE WINS

WINS	RECOGNITION
Note victories to be celebrated.	Person/team to be recognized.

KPI REVIEW [BASED ON MARKETING & SALES SLAS; MAY LINK TO ONLINE DASHBOARD/REPORT]

MARKETING

KPI	WEEKLY GOAL	LAST WEEK'S ACTUAL
Open Leads		
MQLs (Seek Discovery Call)		
SQLs (Discovery call scheduled)		
Opportunities		

SALES

KPI	WEEKLY GOAL	LAST WEEK'S ACTUAL
New Leads Contacted		
Sales Closed ($TCV)		
Close Rate		
Monthly Run Rate ($)		

RECAP PREVIOUS WEEK

Marketing:
- Marketing team leader discusses notable events from prior week.
- Discuss KPIs not met.

Sales:
- Sales team leader discusses notable events from prior week.
- Discuss KPIs not met.

PRIORITIES FOR THIS/NEXT WEEK

- Discuss and agree on priorities for the upcoming week.
- Be specific: Assign responsibilities, timetable, etc.

WHAT ROADBLOCKS ARE WE HITTING?

- Forum for any attendee to discuss roadblocks encountered, propose solution, etc.
- Open and honest discussion.
- Two teams agree on resolution plan

ACTION ITEMS

TASK	OWNER	DUE DATE
Task name and brief description		