
Crafting An Internal Service Level Agreement (SLA)

Foundations for better Sales
& Marketing Alignment

What are SLA's?

Your service level agreement (SLA) sets the tone for your relationship between Sales and Marketing by outlining responsibilities, terms and timelines you will both work under.

When you're clear on expectations, you will be able to measure and manage your teams performance in a meaningful way. The better your agreement, the more alignment you will see.

Why do you need an SLA?

By implementing an SLA, you can specify exactly what is (and is not) covered in campaigns, document roles and responsibilities of both teams, and define service prerequisites that set you up for success.

When done well, an SLA delivers a strong framework for your business and execution to run smoothly. All stakeholders will be able to refer to agreed-upon deliverables, see clearly defined terms of service, and access specific instructions for support and escalation.

As you begin to craft your
SLA, **DO** keep these
principles in mind if you
want to get the blueprint
right the first time.



- Do develop a framework to help you map out your SLA and maximize your efficiency. Rely on automated workflows, where possible, to help you save time and deliver faster service.
 - Do identify specifically what is and is not covered to avoid confusion on both sides. Make sure important things like team availability and stakeholders are clearly defined.
 - Do monitor your progress against SLA goals. Rely on reporting to help you keep customers aware of how you're meeting and exceeding your SLA promises.
 - Do automate reporting. Providing real-time performance to customers through automated reporting provides full transparency into the real status of the agreed upon metrics.
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An **SLA** should be specific, measurable and have clear priorities to hold all parties accountable. **DON'T** let these mistakes render your effort ineffective.



- Don't treat it as a solution to reported issues. Address concerns immediately, so each team feels heard, and then revisit the SLA if necessary.
- Don't make it one-sided. Your SLA needs to work for Sales and Marketing, so make sure it is equally beneficial.
- Don't let issues fester. Define thresholds to alert you to issues before they impact your SLA, and communicate performance expectations down to your sales and marketing teams to keep everyone on the same page.

What should be included?

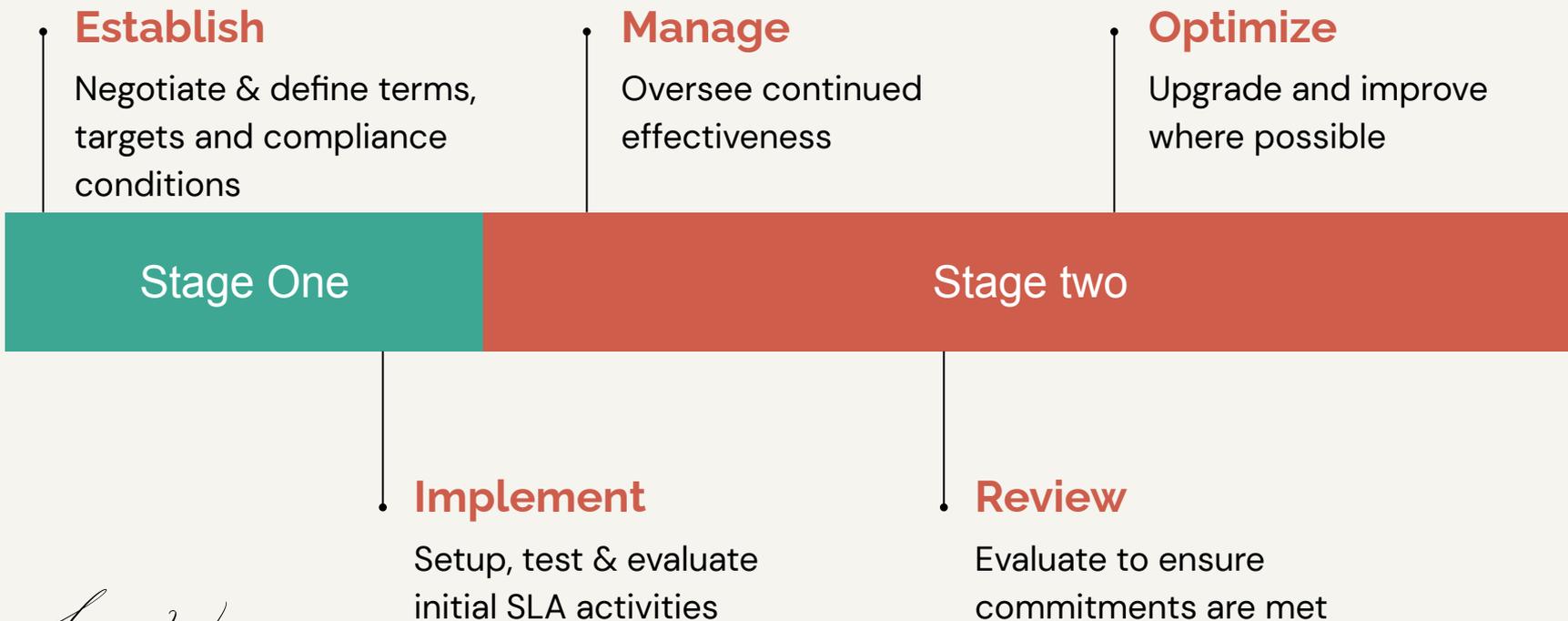
Categories Include:

- Goals
- Metrics
- Qualification
- Hand-off
- Nurturing
- Reporting

Terms Include:

- Definition of Service
- Coverage Hours
- Performance Measurement
- Process and Response Time
- Service Requirements
- Covered collateral and/or Services
- Minimum Standards

Implementation Process



Sample SLA Spreadsheet

	Marketing Team	Sales Team	Shared Tasks & Goals
 Goals	<p>Example Goals:</p> <ul style="list-style-type: none"> # of Accounts reached to hit lead target # of leads to hit opportunity target 	<p>Example Goals:</p> <ul style="list-style-type: none"> Sales quotas Account expansion 	<p>Example Goals:</p> <ul style="list-style-type: none"> Company OKRs Company growth goals
 Metrics	<p>Example Metrics:</p> <ul style="list-style-type: none"> MQL volume per month Opportunities generated through ABM campaigns 	<p>Example Metrics:</p> <ul style="list-style-type: none"> Sales win rate (lead-to-customer conversion) Meetings held on key accounts 	<p>Example Metrics:</p> <ul style="list-style-type: none"> Average length of sales cycle Average LTV of customers
 Qualification	<p>Example Qualifications:</p> <ul style="list-style-type: none"> Target personas (ICP) Priority accounts Industry/product fit 	<p>Example Qualifications:</p> <ul style="list-style-type: none"> Sales acceptance based on BANT criteria Confirmation of intent 	<p>Example Qualifications:</p> <ul style="list-style-type: none"> Lead/Account Scoring Quality score analysis
 Hand-off	<p>Example Questions:</p> <ul style="list-style-type: none"> Alert sent from marketing in x timeframe Assignment in Salesforce 	<p>Example Questions:</p> <ul style="list-style-type: none"> Sales Acceptance in x timeframe Update lead status to working 	<p>Example Triggers:</p> <ul style="list-style-type: none"> Marketing Automation alerts Lead status updates in reporting Demo request/contact sales automation
 Nurturing	<p>Example Strategies:</p> <ul style="list-style-type: none"> Recycle leads from sales outreach Automated emails/workflows 	<p>Key Questions:</p> <ul style="list-style-type: none"> How does sales trigger a lead a working? What is sales plan for outreach? What is the frequency between touches? 	<p>Key Questions:</p> <ul style="list-style-type: none"> What information needs to be gathered? <p>Example Strategy:</p> <ul style="list-style-type: none"> Owned accounts nurtured by sales, new accounts added to marketing nurture
 Reporting	<p>Key Question:</p> <ul style="list-style-type: none"> Who is the main marketing POC for reports? <p>Example Report:</p> <ul style="list-style-type: none"> Revenue Marketing funnel conversions 	<p>Key Question:</p> <ul style="list-style-type: none"> Who is the main Sales POC for sales performance? <p>Example Report:</p> <ul style="list-style-type: none"> Account Executive Dashboard 	<p>Example Report:</p> <ul style="list-style-type: none"> Monthly performance meeting SLA realignment Marketing & Sales deep dive