

Aligning Sales & Marketing



1. Goal setting

Unite the team by understanding where you are now, what marketing assets you have, and your organisational growth goals.

2. Lead Qualification Framework
Define what a lead is, what an MQL is, what an opportunity is etc.



3. Build the Engine

Outline how you will generate leads.

4. Implement Smarketing
Define follow on process, what happens at each Lifecycle and hold both sales and Marketing accountable.



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Goal setting

To start the process, we first begin with the goals we have.

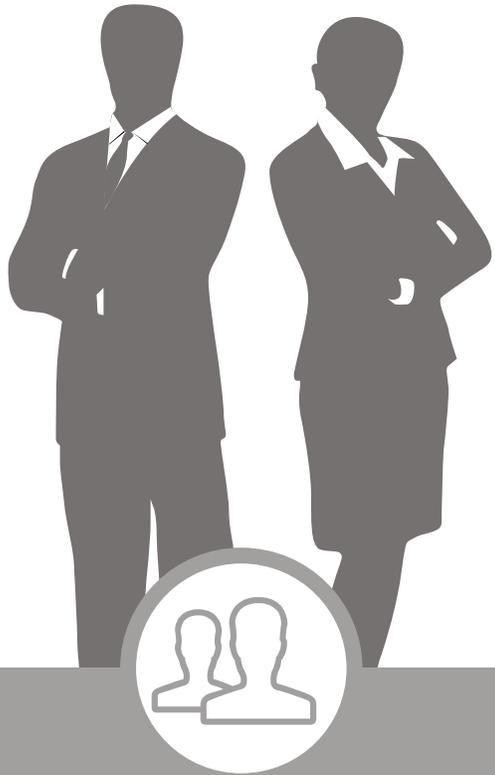


A	B
Today Turnover at	£2,000,000
Target in 3 years	£5,000,000
ARR per deal Won	£250,000
ARR for 4 Deals	£1,000,000
Target ARR in 3 years	£3,000,000
Lead/opportunity conversion %	30.00%
Opportunity to Won %	12.00%
Average Deal Size	£250,000
Annual Revenue Goal (12 Months)	£1,000,000
Monthly Revenue Goal (Annual Revenue/12)	£83,333
Quarterly Revenue Goal	£250,000
Number of Deals to close per month (Average deal size/revenue goal per month)	0.3
Number of Deals to close per quarter	1
Number of Opportunities required per month (Number of deals needed / Opportunity to Won conv %)	3
<u>Number of Leads required per month (Opportunities required/lead to opp conversion %)</u>	<u>9</u>

Phase 1:
Goal setting



Lead Qualification Framework



Phase 2: Lead Qualifying

What is a lead, MQL or Opportunity?

Both Sales and Marketing need to understand what a lead is, what an MQL is, what an Opportunity is etc.

More importantly, Sales and Marketing need to agree on which variables constitute each lifecycle stage.

Qualifying examples

-A lead could be any contact that enters your CRM via any touchpoint. Eg: Your website, Phone call, Livechat etc.

-MQL or Marketing Qualified Lead could be a lead that is from a target country, uses a particular platform etc.

-An Opportunity/SQL could be a lead that has a project defined in 3 months.



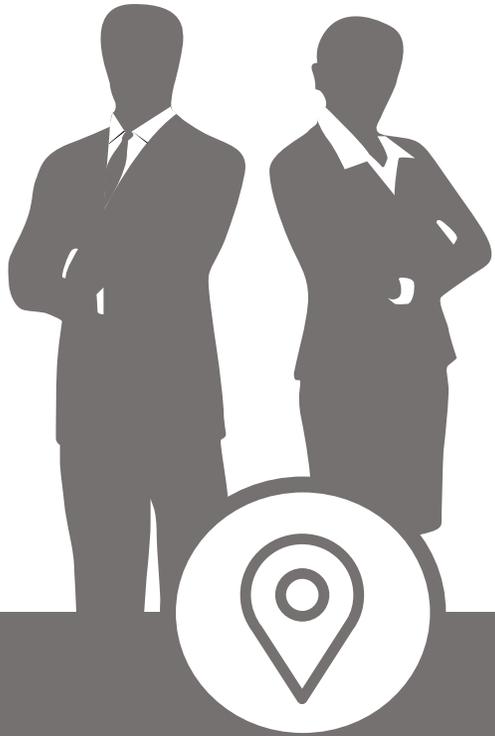
Define how you will generate leads

Channels	Events	Tradeshows (Visitor)	Workshops	Email Prospecting	Networking	Inbound Webinars	Inbound Whitepapers	SEO / Content M	PPC	Podcasts	PR
Total time	2 days		15 months	5 days	2 days	6 weeks	2 weeks	7 months	2 weeks		
Input time =	1 day		1 month	2 days	1 day	2 weeks	1 week	1 month	1 week		
Output time =	1 day		7 days	3 days	1 day	4 weeks	1 week	6 months	1 week		
Impact High	15 leads per event		15 per event	100 leads per month	5 leads per event	20	15	15 leads per month at avg posit	na		na
Likely to work:											
Cost	£200.00		£3,500.00	£200.00	£200.00	£500.00	£500.00	£300.00	£3,500.00	na	na
Possible Value											
Likelihood to refer								£200/m			
Decision										Explore	
Priority:	1		1	1	1	2	2	2	3	3	3
Action steps											
Weekly KPI:											
Expected Outcome											
Actual Outcome											

Phase 3:
Build the Engine



Implement Smarketing



Marketing follow on process

Define the follow on process, what happens at each Lifecycle and hold both Sales and Marketing accountable.

Define Marketing follow on process

-If the lead is not Sales ready (Opportunity or SQL), Marketing will nurture.

-If the lead is not Marketing qualified, we nurture.

What will Sales do when a lead comes in?

-Call the lead within 2 - 48 hours.

-If there is no answer, Sales will follow up 8 times.

-If the lead does not have a project in the next 6 months Marketing will nurture.

-if the lead has a project but not ready to buy, Sales will nurture.

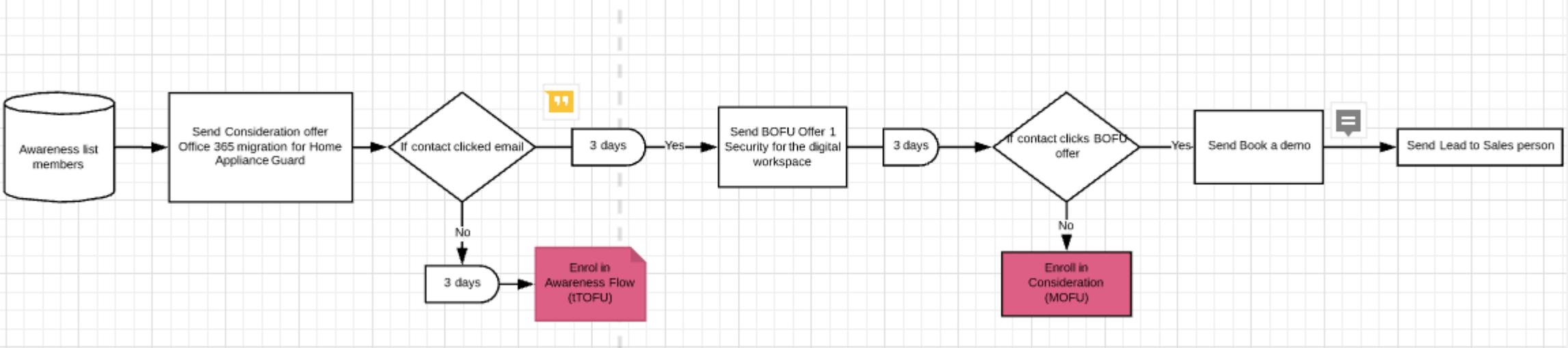
Phase 4:
Implement Smarketing



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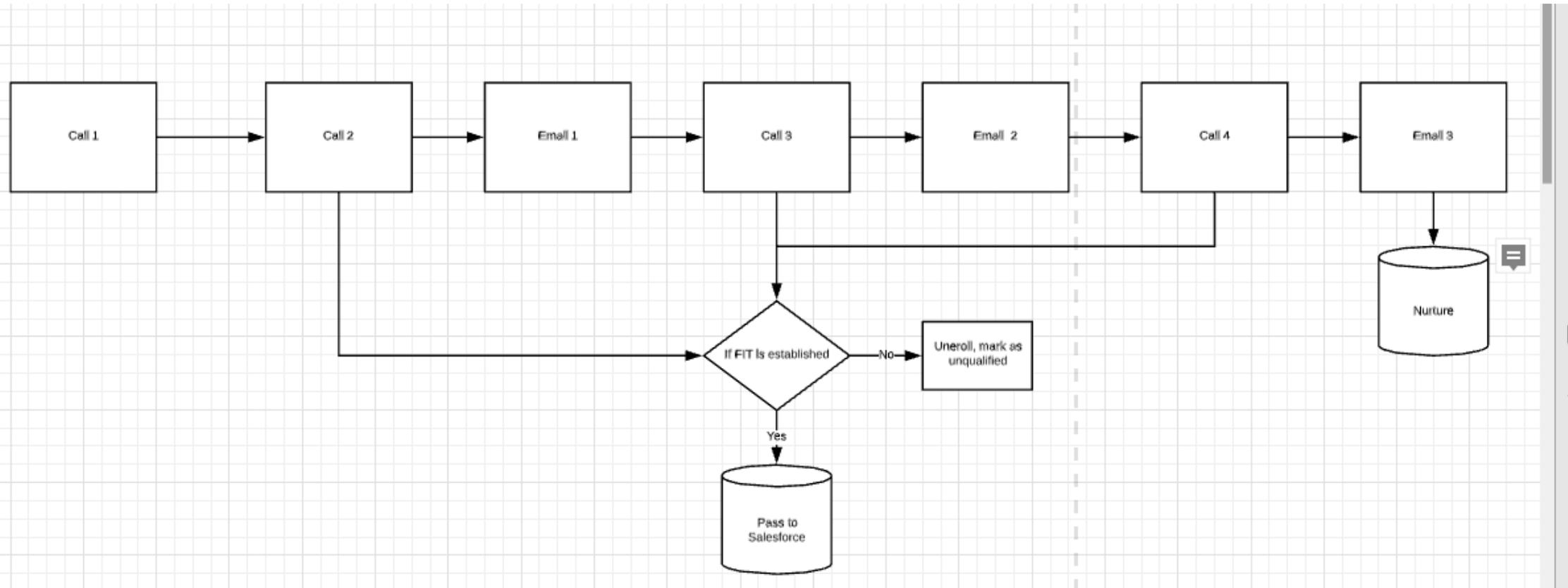
Marketing Follow on process

Using marketing automation, we can nurture leads who are not ready to buy with content until they are ready to buy in the sales cycle.



Sales Follow on process

Using Sale automation software such as Hubspot, Pipedrive, Salesforce etc, we can map out our follow on process to connect with leads.



Implementing the Sales & Marketing SLA

Defining the SLA

We now know what our Revenue goal is.

We know many Opportunities we need.

How many Leads we need per month.

We have our Sales follow on process defined.

We also have our Marketing follow on process defined.

We can define our SLA.

An SLA is a commitment by Marketing to deliver a certain number of leads to Sales per month.

SLA example:

Marketing will deliver Sales a minimum of 9 leads per month and Sales will follow up within 2-48 hours.

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Sales & Marketing SLA Projection Example

	Month 1	Month 2	Month 3	Month 4	Month 5	Month 6	Month 7	Month 8	Month 9
PPC									
SEO	0	0	0	0	0	0	0	0	0
Website Conversion 3%	0	0							
Event Leads (Visiting Tradeshows)			5		5		5		5
Workshops					15			15	
Networking			5		5	5	5	5	5
Email Prospecting Leads	5	5	10	10	10	10	10	10	10
Inbound Whitepapers Leads	10	10	15	15	15	15	15	15	15
Inbound Webinars Leads	5	5		15		15		15	
PPC Leads	2	5	5	5	5	5	5	5	5
SEO Leads									
Total leads Projected	22	25	40	45	55	50	40	65	40
30% conversion to SQL	30%	30%	30%	30%	30%	30%	30%	30%	30%
SQLS Generated	7	8	12	14	17	15	12	20	12
Cost									
Event Leads (External events)			£300		£300		£300		£300
Workshop					£5,500			£5,500	
Email Prospecting Spend	£300	£300	£300	£300	£300	£300	£300	£300	£300
Inbound Whitepapers Spend / LinkedIn Spend	£1,123	£1,123	£1,680	£1,680	£1,680	£1,680	£1,680	£1,680	£1,680
Inbound Webinars Spend / LinkedIn Spend	£561	£561	£0	£1,680	£0	£1,680	£0	£1,680	£0
PPC Spend	£500	£500	£500	£500	£500	£500	£500	£500	£500
SEO Spend		£300	£300	£300	£300	£300	£300	£300	£300
External events spend (Exhibiting)									
Total Marketing Spend	£2,484	£2,784	£3,080	4460	£8,580	£4,460	£3,080	£9,960	£3,080
SQL to Customer 12% Conversion	2%	6%	6%	6%	6%	6%	6%	6%	6%
Customers (Depending on Sales cycle)	0	0	1	1	1	1	1	1	1



Smarketing/SLA Meetings

Weekly SLA Meetings

In smarketing or SLA meetings, identifying and addressing problems should be the top priority.

One way to do that is by using the POP model. POP stands for purpose, outcome, process.

For example, if Marketing's leads aren't closing at the expected rate.

Using the **POP model**:

Purpose: Figure out why the close rate for Marketing leads is low and fix it.

Outcome: Specific action items for fixing the close rate.

Process: Identify the source of the problem, develop a possible solution, and create a plan to implement that solution.

What we do in SLA Meetings

A couple of suggestions for holding Smarketing meetings from Google.

- Respond to ideas verbally to show engagement (“That makes sense. Tell us more.”).
- Recap what's been said to confirm mutual understanding and alignment (“What I heard you say is..”).
- Avoid placing blame (“Why did you do this?”) and focus on solutions (“How can we work toward making sure this goes more smoothly next time?”).



Thank you.

Questions?

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