



Create Your Own Service Level Agreements

A service level agreement (SLA) is a commitment made by a person or organization to deliver a defined level of service over a defined amount of time. SLAs are critical to sales and marketing collaboration as they hold everyone accountable for their roles in the revenue process.

Marketing service level agreements

The marketing team's service level agreement should contain at least two commitments:

- A specified number of qualified leads each month or quarter.
- A certain amount of information for each qualified lead that is passed to sales, such as the lead's first and last name, company name, phone number, email address, and activity history showing engagement and interests.

Sales service level agreements

The sales team's SLAs should focus on ensuring timely and thorough follow-up with the leads they receive.

Sales must guarantee:

- Each rep will spend a certain amount of time following up on each qualified lead.
- Each lead will receive a minimum number of touches.
- Each lead will be kept open a minimum amount of time before sending it back to marketing.

Finally, sales should commit to provide regular feedback on lead quality and quantity to marketing. This requires sales reps to update the status of each lead in their customers relationship management (CRM) application and to attend regular meetings to provide anecdotal feedback on the qualified leads passed to them.

Shared service level agreements

In some cases, sales and marketing will create a shared service level agreement. The most important one is the agreement to meet on a regular basis to review and optimize the program.

On the next page is a customizable SLA for you to use in your organization. Keep in mind the following guidelines when filling out your SLA:

1. Sales and marketing will both agree to service level agreements. SLAs should be created only for activities where the assigned party can control the outcome. For example, marketing should not sign an SLA for sales-accepted leads.
2. The quota for qualified leads should exist in a separate document, as qualified lead quotas will change over time.
3. In the early stages, both sides should agree to meet at least once a week. As the program matures, these meetings can be spread out to every two weeks or monthly.
4. Both sales and marketing must commit to the SLAs and sign the document.

Service Level Agreement

Marketing service level agreements

Activity	Timeframe

Sales service level agreements

Activity	Timeframe

Sales and Marketing service level agreements

Activity	Timeframe

We, the undersigned, hereby commit to this SLA for the following time period:
to

Marketing Contact:

Sales Contact:

Date

Date

Notes: