WHAT IS ALL THAT MARKETING SPEND DOING FOR THE COMPANY?

These questions and their associated reports/dashboards represent the minimum information that sales and marketing should jointly review. Create a book or folder on your phone with the key information that your counterparts are likely to ask, and either memorize it or carry it with you. Pulling this information out of your Marketing Automation and CRM platform will help you answer the only question that really matters. Don't be surprised if answering these questions lead to more questions. They often shine a light into an area that's worth exploring.

1 HOW WELL DO MY CAMPAIGNS CREATE MQLs (AKA LEADS)?

Create a report that shows all of your Campaigns within an appropriate time frame. The columns should show 'Lead Status'. *Tip: Look for high and low performing campaigns.*

2 WHAT ACTIVITY HAVE MY CAMPAIGNS GENERATED FOR THE SALES ORG?

Using the above report as a basis, group the information by different time periods, sales representatives, product lines, territories, etc. *Tip: Look for trends in volume; Look for performance gaps.*

3 HOW WELL ARE MY CHANNELS (I.E. LEAD SOURCES SUCH AS WEBSITE, PPC) DOING?

Run MQLs grouped by Channel against Lead Status. *Tip: Look for high and low performing Channels.*

4 ARE MY MQLs MOVING THROUGH THE SALES FUNNEL? WHY OR WHY NOT?

Organize MQLs by Lead Status and group them by Sales Territory. *Tip: Look for aggregate performance of your MQL. Are too many leads being marked as Nurture? Do they get stuck in a certain stage? Which Territory is struggling with follow up?*

5 HOW MANY SALs CONVERT TO SQOs?

Display marketing Campaigns by Opportunity Stage. *Tip: Look for the Totals compared to number of Campaign members and/or MQLs.*

6 WHAT SALES PIPELINE ($) AND (#) IS GENERATED?

Include in above report or run separately the number and revenue of associated opportunities. *Tip: Note which activities to repeat or improve.*

7 WHAT CLOSED WON ($) AND (#) BUSINESS DID MARKETING CREATE?

Run aggregate revenue sources against the amount and number of Closed Won opportunities. *Tip: Compare against your investment in the programs and look for trends over time.*

CONTACT US
yeti@measuredresultsmarketing.com
571.606.3106

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