

# SALES AND MARKETING PROCESS & PIPELINE AUDIT



	Audit	Strategic Roadmap	ROI
Motions	<p>Pipeline Audit to determine effectiveness of sales and marketing efforts</p> <p>Analysis includes review of current processes and performance against established goals and objectives</p>	<p>Build a 12-month strategic road map complete with staffing and program recommendations with performance projections</p>	<p>A sales and marketing plan and framework to achieve your goals</p>
Metrics	<p>Activity and Process Effectiveness: Prospecting by tactic (inbound vs. outbound)</p> <p>Pipeline and Closed/Win Value by Activity and Pipeline and Closed/Deal ratio by activity</p> <p>Pipeline Contribution by Rep and Marketing Stream. Deal type analysis (new logo vs. upsell/cross-sell)</p> <p>Average Pipeline and Deal Size (monthly, annually, and Lifetime)</p>	<p>Activity and Process effectiveness ratio</p> <p>Waterfall Metrics: Inquiry to lead, lead to sales accepted lead (SAL), SAL to opportunity, and opportunity to close conversion baselines</p> <p>Average deal size (monthly, annual and lifetime). Forecasted pipeline and revenue impact</p>	<p>Pipeline Value and Revenue Impact (monthly, annually and lifetime)</p>
Results	<p>A clear view into performance across sales and marketing functions along</p>	<p>A defined 12-month roadmap complete with clear direction on strategy, tactics, staffing and investment levels needed to achieve sales and marketing goals</p>	<p>Goal achievement</p>