

# Marketing & Sales

KPI's that Drive and Optimize ROI

Are you looking to supercharge your marketing and sales efforts to maximize ROI? Look no further!

This comprehensive worksheet is designed to help you streamline your strategy by focusing on 18 key areas that demand your attention. Whether it's defining clear objectives, ongoing tracking, or efficient management, this worksheet provides you with a structured approach to evaluate your current state, envision the future state, assign scores, and prioritize your actions.

Get ready to unlock the full potential of your marketing and sales performance, setting your business on a path to greater success. Populate the worksheet now and start optimizing your ROI like never before!

	Current State	Score	Future State	Priority
Marketing	Clearly Define Your Ideal Target Market		Clearly Define Your Ideal Target Market	
	Choose and Optimize Your CRM		Choose and Optimize Your CRM	
	Define the Quality of Your List		Define the Quality of Your List	
	Define what is your definition of an MQL		Define what is your definition of an MQL	
	Define what is your definition of an SQL		Define what is your definition of an SQL	
	Define what is your definition of an SAL		Define what is your definition of an SAL	
	Lead Source Tracking Methodologies		Lead Source Tracking Methodologies	
Sales	Sales Activity Tracking		Sales Activity Tracking	
	Sales Outcome Tracking		Sales Outcome Tracking	
	FTA's Tracking		FTA's Tracking	
	Proposal Tracking		Proposal Tracking	
	Win/Loss Tracking		Win/Loss Tracking	
	Deal Minimim Requirements		Deal Minimim Requirements	
	Average Deal Tracking		Average Deal Tracking	
Other	Tracking your CoCA		Tracking your CoCA	
	Tracking Spend to MRR Ratio		Tracking Spend to MRR Ratio	
	Tracking Client Tenure		Tracking Client Tenure	
	Tracking Lifetime Value of a Client		Tracking Lifetime Value of a Client	