Sales and Marketing Effectiveness Metrics

Metric	Focus	Customer Portal	Opt-In Content Website	Configurator, Pricing Engine, Quotation & RFP Generator	CRM-Contact Database	CRM Company Database	CRM Activities & Opportunities	Marketing Automation & Communication	Order Mngt, Prod System, Financials & ERP
Leads by Geography	Marketing						Yellow	Red	
Leads by Product	Marketing						Yellow	Red	
Leads by Segment	Marketing						Yellow	Red	
Leads to MQL	Marketing					Yellow		Red	
Marketing Collateral Usage Rate	Marketing		Yellow					Red	
New Account Contacts (inBnd)	Marketing				Yellow			Red	
Reach	Marketing				Yellow			Red	
Visit-to-lead - CTA Opt In	Marketing		Yellow					Red	
Avg Revenue per Customer	Marketing/Selling	Yellow							Red
Buy Cycle Duration Average	Marketing/Selling						Red	Yellow	
Contacts by Account Size	Marketing/Selling				Yellow	Red			
Cost of Sale/Revenue Ratio	Marketing/Selling						Yellow		Red
Customer Retention Ratio	Marketing/Selling	Yellow							Red
Lead to Customer	Marketing/Selling						Red	Yellow	
Leads Generated	Marketing/Selling						Yellow	Red	
Wins vs Competition	Marketing/Selling						Red	Yellow	
Average Deal Quoted Dollars	Selling			Red					Yellow
Average Deal Size	Selling			Red					Yellow
Average Deal Won Dollars	Selling			Yellow			Red		
Avg Annual Quota Field	Selling						Red	Yellow	
Avg Annual Quota Inside	Selling						Red	Yellow	
Buy Cycle Duration Lost Avg	Selling		Yellow				Red		
Buy Cycle Duration Won Avg	Selling		Yellow				Red		
Expense Budget / Actual	Selling						Red	Yellow	Red
Lead Response Time	Selling						Red	Yellow	
Leads Gened to Leads Worked	Selling						Yellow	Red	
Leads Worked to Leads Connected	Selling						Yellow	Red	
MQL to Opportunity	Selling						Yellow	Red	
New Account Contacts (OutBnd)	Selling				Yellow		Red		
Opportunity to Customer	Selling						Red		Yellow
Outbound Rate of Contact (follow up)	Selling				Yellow		Red		
Outbound Rate of Contact (initial)	Selling				Yellow		Red		
Percentage Achieving Quota	Selling						Red	Yellow	
Post Engagement Win Rate	Selling						Red	Yellow	
Proposal Close/Submit Ratio	Selling			Red			Yellow		
Proposals Closed	Selling			Red			Yellow		
Proposals Submitted	Selling			Red			Yellow		
Revenue Pipeline	Selling			Yellow			Red		
Sales - New Customer	Selling						Red	Yellow	
Sales by Geography	Selling						Red	Yellow	
Sales by Product	Selling						Red	Yellow	
Sales by Sales Rep	Selling						Red	Yellow	
Sales by Segment	Selling						Red	Yellow	
Sales Existing Customer	Selling						Red	Yellow	
Sales Forecast / Actual	Selling						Red		Yellow
Total Closed Opps per Rep	Selling						Red	Yellow	
Total Open Opps per Rep	Selling						Red	Yellow	
Win Rate	Selling						Red	Yellow	

PRIMARY SOURCE: Red   **SECONDARY SOURCE:** Yellow