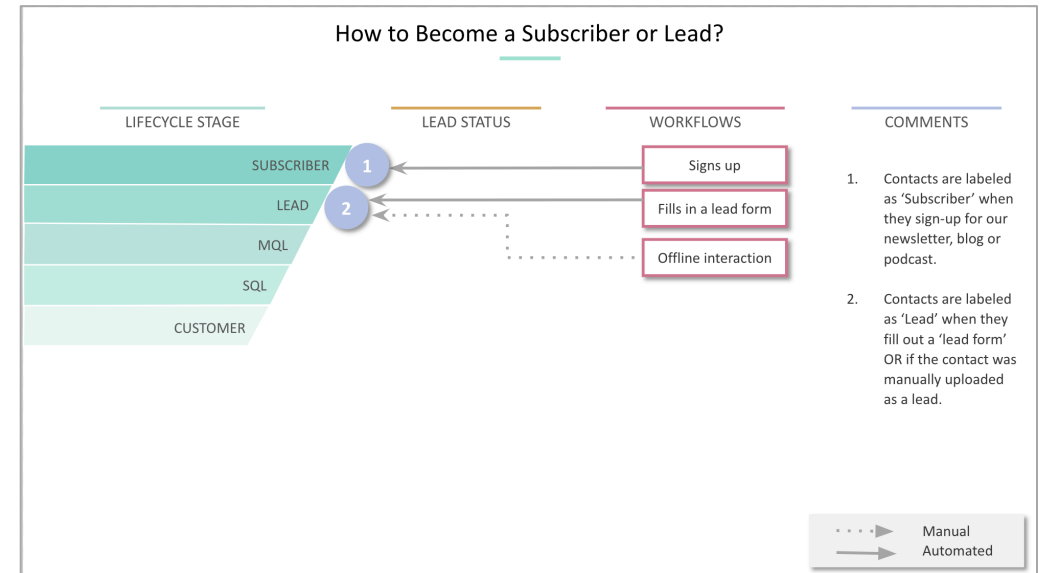


# SMarketing Process and Automation Playbook

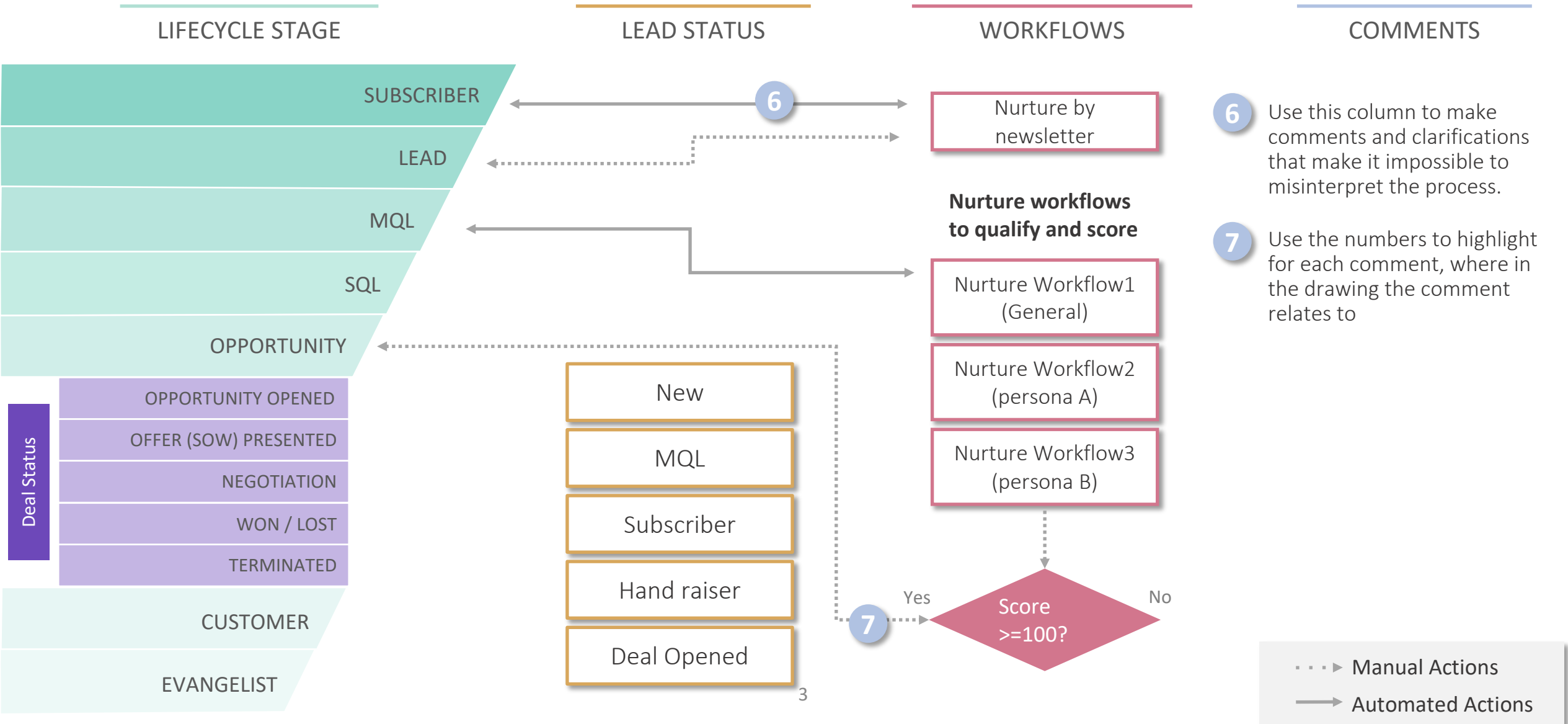


# How to use this template?

- First hold a 'Sales & Marketing' alignment meeting with all relevant stakeholders and agree on a set of statuses for each of the entities:
  - Lifecycle stage
  - Lead status
  - Deal statuses
- Modify the template slide to fit the agreed stages
- Duplicate the template slide as many times as you need, and in each slide focus on detailed explanation of one step of the funnel. Delete from the slide elements that are distracting.
- For each slide replace the title with the specific question that it answers
- Use solid lines to represent processes that are automated, and dotted lined for processes that are manually handled



# Template Slide: Replace this line with the exact question that this slide answers



LIFECYCLE STAGE

LEAD STATUS

WORKFLOWS

COMMENTS

SUBSCRIBER

LEAD

MQL

SQL

OPPORTUNITY

OPPORTUNITY OPENED

OFFER (SOW) PRESENTED

NEGOTIATION

WON / LOST

TERMINATED

CUSTOMER

EVANGELIST

New

MQL

Subscriber

Hand raiser

Deal Opened

Nurture by newsletter

**Nurture workflows to qualify and score**

Nurture Workflow1 (General)

Nurture Workflow2 (persona A)

Nurture Workflow3 (persona B)

Score >=100?

Yes

No

6 Use this column to make comments and clarifications that make it impossible to misinterpret the process.

7 Use the numbers to highlight for each comment, where in the drawing the comment relates to

... Manual Actions

— Automated Actions

For further assistance go to:  
[www.penguinstrategies.com](http://www.penguinstrategies.com)

