SMarketing Process and Automation Playbook

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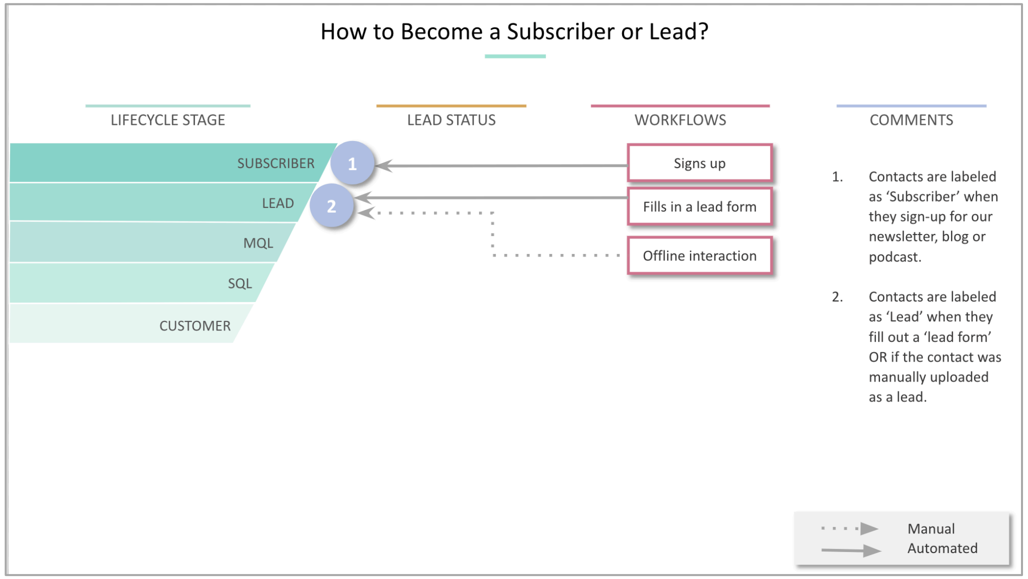
How to use this template?

- 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



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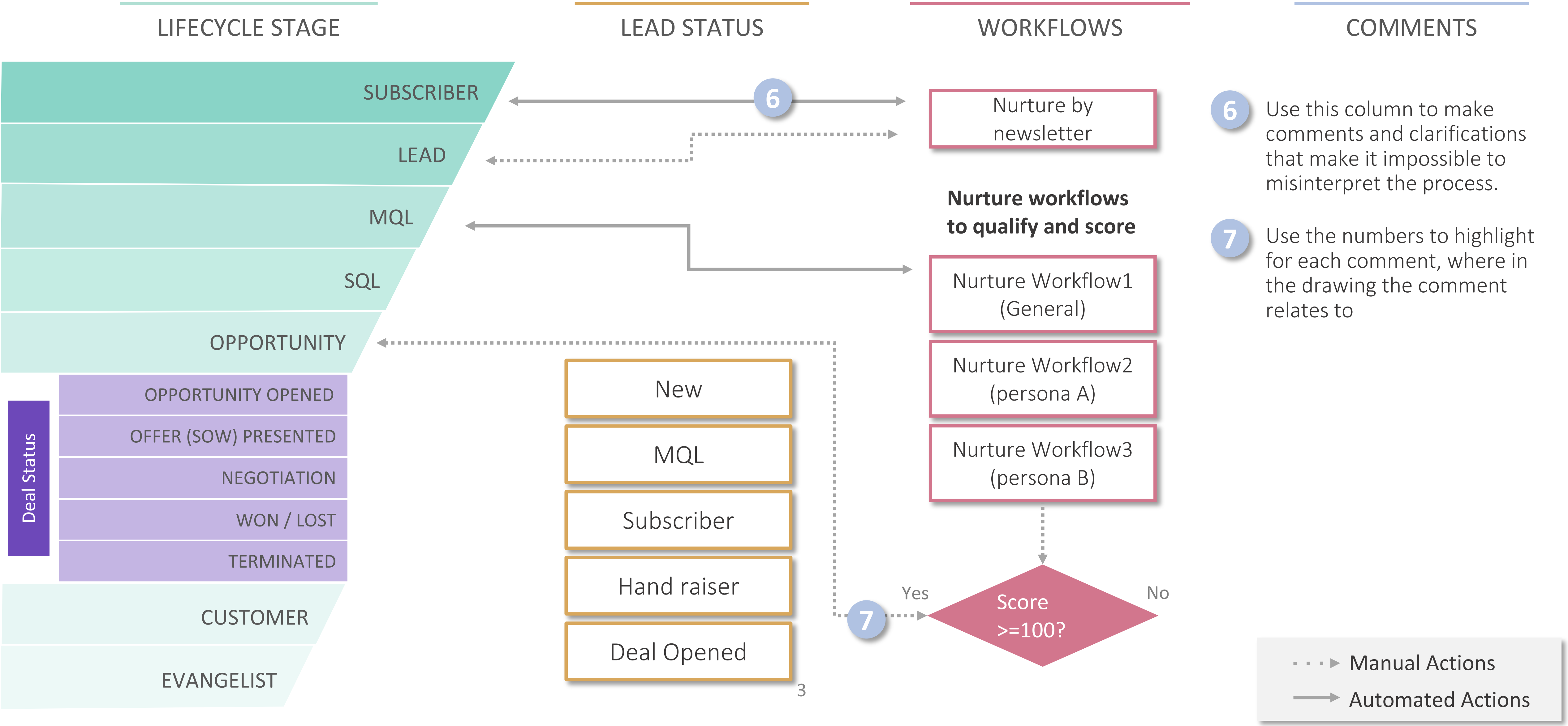
Template Slide: Replace this line with the exact question that this slide answers



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