



Sales and Marketing Engine Maturity Professional Services

Capability	Not Implemented	Implemented
Strategy and Planning		
Target markets and ideal client profiles are clearly defined		
A compelling value proposition is articulated		
Sales and marketing goals are aligned		
A documented sales process and methodology exists		
Team Structure and Skills		
Roles and responsibilities are clearly defined		
Regular skill assessments and development programs are in place		
Sales and marketing teams collaborate effectively		
Robust recruitment and retention strategies exist		

Capability	Not Implemented	Implemented
Technology and Tools		
CRM system is fully implemented and utilized		
Marketing automation tools are in place		
Sales enablement technologies are leveraged		
Data analytics and reporting capabilities are robust		
Lead Generation and Management		
Multi-channel lead generation strategies are employed		
A clear lead qualification process is established		
Effective lead nurturing programs are in place		
The marketing-to-sales handoff process is smooth and efficient		

Capability	Not Implemented	Implemented
Client Relationship Management		
Account planning and management processes are established		
Client retention strategies are actively implemented		
Upselling and cross-selling initiatives are ongoing		
Client feedback and satisfaction are regularly measured		
Content and Messaging		
Content strategy aligns with the buyer's journey		
Thought leadership is consistently developed and shared		
Messaging is personalized for different audiences		
Brand voice is consistent across all channels		

Capability	Not Implemented	Implemented
Sales Process Optimization		
Sales stages and milestones are clearly defined		
Pipeline management and forecasting are data-driven		
Proposal and pricing strategies are regularly reviewed		
Win/loss analysis is conducted and acted upon		
Performance Metrics and KPIs		
Key performance indicators (KPIs) are clearly defined		
Regular reporting and analysis takes place		
Decision-making is data-driven		
Continuous improvement initiatives are ongoing		