Area \ Level	Area components	1 – Ad hoc	2 - Repeatable	3 - Defined	4 - Managed	5 - Optimized
Level definition – general ->	-	Marketing & Sales are separate and distinct, managed inconsistently across the organization, with different groups doing their own things and not reporting them to each other. Customer care is not organized. Sales "funnel" is wide, leaky.\n\nRedundant, mainly outbound activity: telesales, trade shows, brochure mailings, ads, e-blasts. Customers and prospects confused and annoyed; Partners are not trained.	Marketing & Sales are managed within different areas of the organization with some overlap and guidance as to how to approach it, but there is no overall structure in place to bring it all together. Conflict is the norm. Customer care is reactive.\n\nSporadic activity, mostly outbound: telesales, trade shows, PR, brochures, website/brochureware, e- blasts, ads. Clients recognize brand. Prospects are aware but confused, Partners are unevenly trained.	Marketing & Sales follow a common framework across the organization and the organization has achieved a simple reporting structure that is in place to monitor pipeline only. Customer care is mainly post-purchase.\n\nCoordinated activity, mostly outbound; some inbound, including landing pages, registration, premium content; Customers prospects & partners are neutral about brand, some engaged. Leaky "funnel" i.e. nurturing is weak or non-existent.	Marketing and sales are managed across the organization and adhere to defined processes and methodologies through ongoing collaboration, measurement/metrics, and reporting across business areas. Customer support channel is embedded and extends throughout marketing and sales action chains.\n\nAligned activity, outbound/inbound mix—adwords, blogs, SEO, client advocates, focused jointly on building community. Customers, Prospects & Partners are engaged in product & positive on brand. Wide "funnel" is enhanced with nonlinear nurturing.	Marketing and Sales are aligned and embedded within business processes, roles/relationships, and technology. Customers have a strong support group and a voice in product innovation. Sales funnel is vibrant, well nurtured, and has few if any leaks.\n\nUnified activity. Mainly inbound. Organic lead flow, community nurtured via blogging, SEO, SEM, micro-sites; strong brand, authentic voice, raving customers, viral PR, multiple strong partners & channels
Strategy & Planning	Go-to market strategy,\n\nS&M Strategic influence\n\nCompetitive Intelligence (product positinining)	No evidence of clear documented strategy, no evidence of company positioning understanding. S&M operational influence / role only inside the company. The influence is mainly promotional – does not affect price, product development, distribution. The offer is product-based.	Poor or informal strategy, focused on short-term profit maximizing. Or strategy separated from actual implementation/execution. Company positioning is blurred or not formalized. S&M influence on price and/or distribution appears, but it's sporadic. The offer is feature-based.	Formal S&M strategy at least for a year, clear documented positioning of the company. Systematic participation of S&M in pricing and distribution, first attempts to influence product development. The offer is solution-based.	Formal S&M strategy for 3-5 years, which describes mutual benefits (value for the customer as well).\n\nThe offer is objectives-based.	The S&M strategy is integrated in supply chain or value chain strategy of the company, aimed at value creation for the end customer.\n\nThe offer is buyer-based.
Business processes	Strategic\n\nCustomer/target audience understanding,\nProduct Development,\nProduct Portfolio Management\n\nTactical\n\nPromotion (ads & PR),\nDistribution,\nNew product launch,\nKnowledge Management,\nSales Enablement Program Management (SEPM),\nAccount management\nCustomer Retention\n\nOperational\n\nSales,\nMessaging (Communication)\nSales Materials Management,\nPricing	No evidence / features of strategic business processes.\n\nTactical business processes are random not systemized efforts, often performed by some other functions without S&M function input. Low rate of sales for existing clients, low rate of customers acquired by recommendation.\n\nAd-hoc not standardized and uncoordinated sales process, message is blurred and inconsistent, too wide or too narrow or just misses target audience. Communications media often inadequate to target audience.\n\nSales are accidental and often require lots of effort.\n\nSales materials do not communicate common vision of product / services / company.	Blurred or inconsistent understanding of a target audience, product development is not implemented, product portfolio unbalanced.\n\nSuccess can be reached via tactical processes implementation, but usually only part of them is utilized and they are not coordinated by one S&M strategy.\n\nThe Company has some 'good practice' for acting on operational level, which allows to repeat successful sales.\n\nMessaging is clear and structured, though short-term oriented and still often missing target audience. The message describes the features of the solutions offered.\n\nSales materials reflect gaps in common vision of product / services / company or inconsistency of this vision. There's no standard approach for sales materials use.\n\nPricing is partially based on the standard price-list, partially based on the management estimate.	Clear formal understanding of a target audience, still needs to be verified and adjusted. All tactical processes are in place and are documented, except for Knowledge Management and SEPM. Attempts to implement strategic processes.\n\nStandard documented operational processes, which allow to make successful sales a standard case with a predictable ratio.\n\nThe message fully complies with the S&M strategy and describes the features of the solutions offered. The message is regularly updated based on customers feedback.\n\nSales materials are consistent and reveal solutions offered, the benefits of these solutions for the customers.\n\nPricing is based on a standard price-list with some fixed discounts possible.	The S&M function is the owner of S&M processes and has necessary skills to execute them – e.g., involve employees from the other department into team work.\n\nDetailed formal understanding of the needs for each segment of target audience. Product portfolio management results in balanced products portfolio. Participation in product development.\n\nSEPM results in pro-active projects start-up when required by S&M.\n\nCustomer retention ratio is predictable and stable.\n\nPricing is flexible and aligned with the pricing rules. Regular special offers, especially for existing customers.	Customers participate in strategic processes on equal terms.\n\nKnowledge Management is embedded in other processes and is fully documented.\n\nThe processes are executed as projects, when all the participants play in one team, maybe geographically spread, using communication facilities and centralized databases and methods.\n\nPricing considers customers' cost of purchasing & ownership of product/using a service.\n\nRegular special offers, especially for existing customers, considering customers' cost of purchasing & ownership of product/using a service.\n\nS&M is mostly consultative, helping customers to discover & formulate their needs, suggesting innovative solutions.
People & Culture	Skills,\n\nSocial Collaboration,\n\nTalent Management,	People lack sales skills and experience, general 'office worker' skills prevail. Sales skills present are irrelevant to the industry / customer peculiarities.\n\nNo social collaboration is in place, competencies are not developed.	People have a successful experience of sales for the market, sales specialists play independently; lack of communication between sales and marketing lead to a lack of activities coordination.\n\nSales trainings emerge, but are not systemized.	Employees lacking minimal skills set are not involved in the process until mandatory trainings are passed. Talent development targets are regularly set / updated / execution assessed.\n\nNormally three sales training programs exist: basic, advanced, sales excellence. Sales collaboration still poor, but first attempts are made to build it.	S&M employees create a friendly communication environment with the customers.\n\nCommunication & project management are the most anticipated, special trainings and internal sessions are used to develop them.\n\nS&M and CC employees are mostly pro-active, also react to new customer requests.	S&M employees manage communities of loyal customers online and offline.\n\nLeadership, team playing and mentoring skills are the most anticipated, special trainings and internal sessions are used to develop them.
S&M Organisation	S&M organisation\n\nCommunications structure inside S&M	Chaotic or absent organization: sometimes by product, sometimes by division, sometimes by client or general sales with a wide area of responsibility, spread within organization.\n\nLack of vertical and horizontal communication, thus sales do not exchange information properly, are unaware of product competitive benefits.	Independent S&M department on operational level.\n\nLack of horizontal communication is still present, enhancements in vertical communication: discipline, attempts to implement feedback mechanisms.\n\nProduct competitive benefits are mostly shared via "top-down" channel.	Centralized S&M organization, S&M manager reports directly to CEO.\n\nVertical communication is adjusted (especially feedback loops), S&M targets are aligned among departments.	Centralized S&M department defines the policy and local S&M activity is delegated to local S&M staff, which is able to choose the most effective methods and build local teams.\n\nThe communication is aligned within S&M business processes, S&M goals are aligned with the company ones.	Flexible teams led by S&M specialist are created to solve particular tasks / problems. The team can be geographically spread but the communication culture allows to communicate effectively and efficiently.
IT Systems	CRM,\n\nKnowledge base,\n\nBusiness Analysis,\n\nOther tools used,	Phone, email, excel (basic usage) – primitive or absent reports lacking dimensions. No business analysis tools used.	Some standard reports are used, analytical reports are rarely used and are time-consuming, business analysis tools are not used, no CRM solution, some attempts to structure knowledge in files and network folders.	Databases for clients and contracts are used, but they are not fully integrated with other S&M applications. Contract's database is available for a few departments, e.g., accounting, lawyers. Reporting is automatic. First attempts to use business analysis tools.	Standard CRM solution is implemented (integrated and used in S&M processes). Business analysis tools implemented, first attempts to implement knowledge base.	Knowledge base is a vital business tool, integrated in all the S&M processes: strategic, tactical, operational.